# A-TEK
## Consultants, Inc.

Mr. Paul S. Kenney
Project Engineer
Lockheed Martin Information Systems
12506 Lake Underhill Road, MP 1270
Orlando, FL  32825-5002

cc: John Hartman
    Randy Dougherty

August 15, 1997

Dear Paul,

Thank you for the direction provided during our conversation with you Wednesday.  We will proceed in developing MasterLink© with the following architectural components:

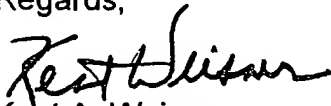| Client | Server |
| --- | --- |
| Windows NT | Windows NT |
| Visual Basic Interfaces | C++ Application Processes |
|  | ILOG Rules (Inference Engine) |
|  | Objectstore Database (OODBMS) |

Should you or Randy wish to change any of these we need to know it as soon as possible.

This guidance and agreement on this issue was very important to us so we develop coding in the right direction without wasting time going down a wrong pathway which we can ill afford to do.

Yes, we are looking forward to getting on contract in the near future so we are able to meet the requirements you have for your project.  Doing so involves major changes for us at MasterLink that we discussed.  Your assistance is needed for us to be able to respond appropriately and professionally as you would expect.

I met with John yesterday and he will be in touch with you next week to advise when you will receive the express package.

Regards,

Kent A. Weisner

**Subject:**
   **Date:** Wed, 27 Aug 97 15:30:00 PDT
   **From:** "Hartman, John" <John_Hartman@tvratings.com>
      **To:** "'ATEK'" <atek@gdi.net>, "'Garry L. Fenimore'" <mlink@mail.gte.net>

Kent & Garry,
Here is the text from my cover letter and the table of contents for the
package.  Looks like we ship on Thursday night.
John

August  27, 1997


Mr. Randy Dougherty
Manager of Logistics Information Systems
Lockheed Martin Information Systems
12506 Lake Underhill Road
MP 1270
Orlando, FL  32825-5002

Dear Randy,

Enclosed you will find the work we have done to enhance the MasterLink
concepts based on feedback received at our meeting of May 30.  This consists
of some additional classes added to the MasterLink class models, some
additional use cases, and some suggested initial interfaces to support those
use cases.  These use cases are in support of the requests for examples of
how "what if" analysis and reporting would be implemented.  This was one of
 the major feedback requests we received at our meeting.  The enclosed
documentation is limited to only these new design artifacts, but is
representative of that which we have produced for all classes and use cases
in the MasterLink design.  See the enclosed table of contents for the
enclosed documentation.

A second category of feedback we received was in regard to a working
prototype.  We have proceeded to build a working prototype development
environment. This is based on Windows NT, C++, Visual Basic, ODI
ObjectStore, and ILOG libraries.  We will soon be ready to discuss what
initial MasterLink functionality should be included in the first functioning
deliverable to be based on this architecture.

A third request we heard was in regard to the "ease of use" associated with
the use cases for maintaining Policy instances.  We have not had time to
suggest a response to this explicitly, but we feel confident we will be able
to provide a solution.

We feel that this deliverable should provide the confidence in MasterLink to
deliver state of the art solutions to work management requirements that will
benefit the needs of Lockheed Martin Information Systems and their
customers.  We look forward to your response to this submission.

Yours truly,


John D. Hartman
Chief Technical Officer

cc:        Paul S. Kenney

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Lead Software Engineer


enclosures


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# MasterLink
*Work Automation & Simplification*

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Randy Dougherty
Manager, Logistics Info Systems
Lockheed Martin Information Systems
12506 Lake Underhill Road, MP  1270
Orlando, FL  32825-5002

September 10, 1997

Dear Randy,

During our telecon last week you said, "What is missing for me is a verbal
description from A to Z as to what this thing is going to do."  Attached is a
confidential summary prepared for you.

We believe our use of the word policy has caused some confusion and have
substituted "Work Process Specifications" in its place.
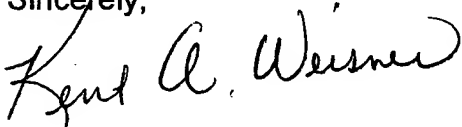
See page two and three covering All Work Environments and Domain Specific
Elements.  These two pages have definitions on them essential to MasterLink©.
This information was given to Greg Howard several months ago and may not
have been passed along to you.

Gary Fenimore and I would like to have a telecon with you tomorrow in the p.m.
or at your earliest convenience.  I would like to have a business discussion as
well.

Thank you.

Sincerely,

Kent A. Weisner

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# A-TEK
## Consultants, Inc.

CONTRACT SERVICES
PROJECT MANAGEMENT
PERMANENT PLACEMENT

Mr. Richard Licursi
President
Pheonix Wireless Group, Inc.
2300 Maitland Center Parkway, Suite 200
Maitland, FL  32751

October 15, 1997

Dear Dick,

This is to confirm my requested appointment with you via Lisa Lill.  I will be there on Monday morning, October 20, 1997 at 10:30 a.m. in your office.  It will be fun to catch up as it appears no grass has grown under our feet.

We believe we may have something very complimentary to what you are doing. A product we are developing, MasterLink©, uses wireless client server technology to link management and a mobil work force to automate and simplify work (the performance of all phases of the life cycle of a job).  It will change the way work is done in the world and is applicable to nearly all work domains. Wireless communication is a key to our system.

MasterLink© is in last phase development and I would appreciate you telling me about Columbia Capitol Corporation.  We have been boot strapping and it is time for final phase and perhaps a strategic partner to maximize the opportunity we have created.

I have presented this to Phil Crosby and he has endorsed it as, "a computer era breakthrough that lets management manage while the work force is fully utilized".

Looking forward to meeting with you.

Sincerely,

Kent A. Weisner
President

# NON-DISCLOSURE AGREEMENT

AGREEMENT by and between MASTERLINK CORP., Garry L. Fenimore, President, 716-44th St. W., Bradenton, Florida 34209, and A-TEK CONSULTANTS, INC., Kent A. Weisner, President, 3649 All American Blvd., Orlando, Florida 32810-4726 (and any successive legal d.b.a. entity that they are principally involved) and,

(hereinafter called "Recipient")

IN CONSIDERATION of MasterLink Corp., hereafter referred to as MC and A-Tek Consultants, Inc.,hereafter referred to as ACI, furnishing Recipient with certain product, financial, and other valuable information (hereinafter called "information") pertaining to the operation of the business of MC/ACI and marketing of its products and services, which information is proprietary to MC/ACI and acknowledged as such by Recipient, the parties do hereby agree as follows:

1.    Recipient will hold in confidence the information furnished to it by MC/ACI under this agreement and will not distribute, disclose, or disseminate such information in any way to any person, corporation, association or governmental entity without MC/ACI's prior written consent.  In addition, Recipient will not without MC/ACI's prior written consent, utilize such information in the design, development, production, or provision by or on behalf of Recipient, or any product or service, similar product or service, to which the information may be applicable.  The obligations and restrictions imposed by this provision are limited as follows:

Recipient shall not be liable for disclosure or use of any such information which:

a)    is or becomes available to the public from a source other than MC/ACI;
b)    is lawfully obtained by Recipient from a party other than MC/ACI;
c)    is known by Recipient prior to the disclosure thereof to Recipient by MC/ACI; and,
d)    is released upon the prior written consent of MC/ACI.

2.      No license to Recipient under any patents, copyrights or trademarks is granted or implied by conveying any information to Recipient and none of such information which may be transmitted shall constitute any representation, warranty, assurance, guarantee or inducement by MC/ACI to Recipient with respect to the infringement of patents, copyrights or trademarks or other rights of others.

**RECIPIENT**                                    **MASTERLINK CORP.**

_____
Company

_____          _____
Signature                                        Signature

_____          _____
Printed Name                                     Printed Name

_____          _____
Title                                            Title

_____          _____
Date                                             Date


                                                 **A-TEK CONSULTANTS, INC.**

                                                 _____
                                                 Signature

                                                 _____
                                                 Printed Name

                                                 _____
                                                 Title

                                                 _____
                                                 Date

2

The <u>problem</u>: **Mobil workers of the world cannot access the information needed to complete work assignments efficiently.** Existing <u>data centric systems tend to reduce</u> management's ability to properly influence <u>workflow process</u>.

The <u>solution</u>: <u>MasterLink©</u>. This software system **provides mobil workers** with wireless access to information needed to perform job tasks **(work)** optimally in the most efficient, cost effective manner. **MasterLink© automates and simplifies work using an event driven, knowledge based and process centered system.**

<u>MasterLink's</u> interactive software provides real time information, where and as needed. Job tasks are completed more effectively and efficiently. This achieves the primary purpose of any enterprise. The software is a **management tool. It controls costs, permits simulation ("what ifs"), advantageously alters systems behaviors, and keeps score.** <u>Information goes in from the bottom up</u> (work status) <u>and the top down</u> (policy, rules, & job state, target and task definitions). The system processes are constantly updated <u>in real time, so everyone knows what to do</u>. <u>Everyone in the enterprise is able to judge the effectiveness of their contribution.</u> Management can continually evaluate overall achievement of stated objectives and goals.

Generic by design, **MasterLink© crosses all lines and is applicable wherever work is performed.** It is universal **and opportunity is world wide** in improving man's ability to perform work, as we know it.

MasterLink© evolved by two fundamental disciplines; object oriented framework technology and behavior controlled agent technology. These drive our definition & rules based expert system used to control job state transitions.

To accommodate transition and utilization of existing legacy systems **MasterLink© has developed a slide in intelligent layer that integrates with existing M I S** to raise current systems to a higher level of performance.

MasterLink© represents a distinct philosophy of organizational workplace management and its core is facility management (facility being defined as any infrastructure, physical or logical, that enables enterprise activities). Enterprise endeavors are viewed as "chains of activity". These chains have specific beginnings and endings that, depending on how well they are coupled with each other, are directly related to overall success of the enterprise.

# MasterLink

*Work Automation & Simplification*

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MasterLink© is the work process improvement company.

We are re-engineering the work process and have developed MasterLink© to do as its name implies--be the "MASTER LINK" providing both management and the work force with the information they need to get the job done right.

Unfortunately, growing numbers of the work force (mobile and stationary) are not getting useful, accurate and up to date information. Worse, workers tend to get unfiltered information (data overload). Systems are data centric and that is a big problem.

MasterLink© is changing this with its work process automation simplification technology. MasterLink© is a process-focused software application used to manage the activities of stationary or mobile skill workers that:

- *REDUCES SYSTEM IMPLEMENTATION* and customization costs by utilizing industry-specific standardized data definitions
- *AUTOMATES SUPERVISION* (planning, scheduling and dispatching)
- *LINKS* skill workers to all job information when they need it.
- *AUTOMATES* field data reporting
- *ENABLES* management control of skill worker activities, based on policy. Policy is the set of rules that management uses to manipulate the system behavior to achieve specific outcomes.
- *INFORMS/ENABLES/ & KEEPS SCORE* for corporate management by providing superior feedback capabilities

MasterLink© delivers these skilled work force optimizing capabilities with unique *simplicity*. We have software tools to use in defining each domain requirement and specification. Our engineering design and documentation has been completed in great detail which will enable us to deliver on time or ahead of schedule and often under budget. Only final coding remains to complete the MasterLink work process Management System.

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## *CONFIDENTIALITY STATEMENT*

The information, data and drawings embodied in this business plan are strictly confidential and are supplied on the understanding that they will be held confidentially and not disclosed to third parties without the prior written consent of MasterLink Corp.

## *MEMORANDUM OF RISK*

The following business plan represents management's best current estimate of the future potential of the business. It must be recognized that no business is free of major risks and few business plans are free of errors of omission or commission. Therefore investors should be aware that this business has inherent risks that must be fully evaluated, discussed with management and experts fully capable of interpreting the information prior to any investment.

**Executive Summary**

| | |
|---|---|
| Company Name: | MasterLink Corporation |
| Contact: | Kent Weisner |
| Address: | 3649 All American Blvd. |
| | Orlando, FL 32810-4726 |
| | |
| Telephone: | (407) 299-3900 |
| Fax: | (407) 299-8200 |
| E-mail: | atek@gdi.net |

## BUSINESS DESCRIPTION

MasterLink© is a management services company. Its comprehensive software systems can be utilized by any business organization to achieve greater productivity. MasterLink© systems enhance the capacity of workers to perform assigned tasks. The system defines the job, provides the worker with all necessary information when and as needed and lets the worker know how well the job was performed. MasterLink© automates supervision, automates field data reporting and in addition to keeping score, lets management manage more effectively.

MasterLink© is a computer software development company specializing in work flow decision automation and job task simplification. The MasterLink© software systems include a sophisticated tool box that quickly and efficiently identifies domain specifications. This results in rapid implementation of MasterLink©'s intelligence layer into its own or into an existing database.

MasterLink© was founded in 1994 by Garry Fenimore, John Hartman and Kent Weisner. The principals recognized the need in the work place for an object oriented designed software system responding to essential information transfer directly to the individual performing work. The MasterLink© system focuses on the support and feedback process at the point of delivery of work.

MasterLink© was formed as a "C" corporation.

## CURRENT POSITION AND FUTURE OUTLOOK

1.  MasterLink©'s software system is unique in the industry. It is the first object oriented system that defines work through policy. It includes rules essential to transfer information in support of job tasks and measures effectiveness and contribution to the success of the enterprise. The applications for MasterLink©

are virtually universal. Wherever work is performed and the related tasks require information essential for the completion of work, MasterLink© will be in demand.

2.  This business plan will focus on facilities and maintenance management. MasterLink© can be applied in any domain requiring work. Management personnel with facilities and maintenance responsibilities are constantly in the hunt for systems that improve process and procedures. Increasing the useful life of assets, simplifying work, automating work flow decision making and setting the stage for productivity improvement, are all part of the MasterLink© benefit package.

    a.  MasterLink© can solve facilities and maintenance management problems by:

    - accurate, two-way, rules-based data communication
    - coordination of best practice methods at the point of delivery of the work or service.
    - carefully defined work expectation and immediate feedback on individual performance sets up an environment for productivity gain. Unit cost per task performed is reduced.

    As is frequently the case, many organizations are "data rich." MasterLink© through its "Intelligence Layer" can bridge the various data arrays in data centric systems. It then extracts the necessary detail to enable its own active agents to automatically perform the tasks and keep score for the total benefit of the enterprise.

3.  Data processing software is on an ever increasing sales demand curve. To our knowledge, MasterLink© is the only supplier of software "that lets management manage the operation while the work force has the information to be fully utilized." A quote from Philip Crosby, author. Mr. Crosby is recognized world-wide as the leading voice in quality management and management strategies. He has endorsed our MasterLink© product.

4.  The skill sets of our principal developers are a primary asset (see resumes). The design and documentation for the system is complete. When the core for the system has been fully coded (programmed) MasterLink© will own and control the key element of the software package. This coupled with a tool box that quickly specifies domain application requirements makes MasterLink© even more attractive product.

5.  Secure last stage development resources to complete software core coding with a key strategic partner or angel financing, thus replacing current boot strapping approach. This alteration would significantly accelerate completion of the coding project. The company will then seek a value delivery partner within each work domain. MasterLink© will roll out its product for application in other domains such as aerospace, telecommunications, utilities/transportation, and manufacturing.

6.  We would prefer to have a single strategic partner who is also a customer/user of MasterLink© or angel investors to enable us to rapidly move to product completion and market penetration. Funds will be used to complete the intelligent layer and coding of the core as well as support for the initial marketing campaign and rapid roll out into other vertical markets (see page 5 use of funds). MasterLink© will enter into value added delivery relationships for each of the targeted industry domains such as health care.

## MANAGEMENT AND OWNERSHIP

Garry Fenimore has 11 years experience as a technical facility specialist. He has served as operation auditor focusing on energy and maintenance management. His employers have included the Siemens Corporation. His experience with computer aided facilities management (CAFM) and computer aided maintenance management (CMMS) led him to the conclusion that these systems were data centric, inhibited management innovation and led to increases in departmental costs. This led him to the creation of MasterLink©.

John Hartman is chief technology officer for MasterLink Corp. He brings 15 years of functional systems analysis, design, and project management skills. He is currently serving as Information Systems Director for a Fortune 500 company. As an object-oriented programming specialist he is the "object evangelist" for methodology and technique in all production areas of MasterLink©. Additional support is provided by Steven Beaver an object oriented software development specialist. He has designed, developed and implemented middleware which supports the basic functionality required to implement Business Applications in an object oriented environment. His work for The Technical Resource Connection, Inc. helped result in the sale of TRC to Perot in 1996. He brings expertise in Object Oriented and Artificial Intelligence Technology to MasterLink©.

Kent Weisner is in charge of business development for MasterLink©. He brings 20 years of successful business management, business ownership and

entrepreneurial and start up business experience. Typically, he has total dedication and commitment to achieve MasterLink©'s objective.

The principals of the company are supported by a number of highly skilled individuals possessing both technical and marketing capabilities. A-Tek Consultants, Inc., is a supplier of professional software services. This business is owned by Mr. Weisner and will be a source of support personnel for MasterLink©.

2.    The above management team also owns the business.

## UNIQUENESS OF THE SERVICE

1.    We have the ability to rapidly identify and specify the "work" requirement of a domain and then provide the solution, the MasterLink© as its name implies to do the work efficiently and effectively. MasterLink© automates supervision through policy "rules" inclusion and simplifies work by providing real time information to the work force. This eliminates costly non-value added activities and allows the work force to be fully utilized. The system monitors the enterprise, monitors itself and is designed to be self-improving. MasterLink© is the first automated and simplified work process system whose design provides for universal applicability to all work domains. (Very little customizing is required) The software system improves productivity at all work levels. The markets served by MasterLink© are universal.

MasterLink© is perceived as a one of a kind software developer. Its image is reflected in the quality and ability and capability of its personnel. The company is located in Central Florida. Product pricing is determined by the complexity of the domain in which the software is to be installed. The way work is done will be changed (for the better) by the installation of MasterLink© systems. MasterLink© is affiliated with A-Tek Consultants, an established software contract services company. A-Tek is a supplier of permanent and contract personnel. A-Tek/MasterLink© has program support from business notables such as Philip Crosby (*Quality is Free*) and Peter Schutz (former CEO of Porche, A.G.). We will be placed on Mr. Crosby's web site page. Much of our other advertising will be word of mouth

2.    Our extensive market research has failed to find any organization with a software package that remotely matches the strength, features and power of MasterLink©.

## FUNDS SOUGHT AND USAGE

1. We seek strategic partnerships in each target domain. The partner becomes the domain expert for that market area.

2. Participation and partnership structure is negotiable.

3. The partner will be expected to fund the necessary coding (programming) to complete the software preparation for that particular domain application.

**EXIT**

1. Liquidity for the investor can be expected following an anticipated IPO. The timing is dependent on product roll out and initial sales. The IPO is expected to be placed within 16 to 30 months from the date of funding.

2. The investors will have a choice of cashing out by "putting" his/her stock at the time of public offering or on the open market any time thereafter.

**FINANCIAL SUMMARY**

MasterLink© Corporation, in the next five (5) years, will conservatively create a revenue stream of $200 million with a 20% net profit.

Detailed financial information for 1 year development and 5 year roll out numbers are available. The above numbers are achieved within 2 to 4 work domains and there are between 12 and 20 domains that we will serve aggressively.

# MasterLink
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CONFIDENTIAL

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MasterLink©, the company, was founded to produce object oriented frameworks for the automation of mobile work force management.

The vision is based on three major components:
- The implementation, in software, of the real world active agents involved in all phases of the life cycle of a job. These include abstractions for all levels of the enterprise, e.g. Executives, Managers, Planners, Supervisors, Mobile Workers, and External Resources. These agents govern all aspects of work flow. This includes such functions as the automatic generation of planned jobs, the scheduling and assignment of jobs to the optimum resources, the dispatching of work to mobile workers, the collection of status information from the field force, and the ability to react to unplanned event jobs.
- The user defined control of the MasterLink© active software agents through the establishment of sets of rules and definitions called Work Process Specifications (which we call "Policy"). Instances of Work Process Specifications (Policy) provide the basis for a rules based expert system, which implements the decisions associated with the various state transitions within a job's life cycle. Executives, through Work Process Specifications (Policies), can have a direct effect upon the behavior of the system agents and in turn the mobile work force, providing yet another link in the work delivery chain. This will empower Executive management to be able to adjust and adapt work flow process specifications(policies) and procedures through the system, and get a tangible measurement of the results of management strategies. Extensive management reporting, including "what if" analysis will aid managers in making Work Process Specifications (Policy) decisions.
- The use of wireless client server technology to establish the Link between the mobile worker and the resources of the knowledge base environment resident on the server. This active link will allow for delivery of just in time information to the mobile worker, and also for timely delivery of work status data back to the central server.

These three major components establish the MasterLink© between management and a mobile work force, through the system and its knowledge base. This will result in the following benefits being realized:
- Increased efficiency in every phase of a job life cycle.
- Reduced personnel requirements, allowing for expanded work load or redeployment of resources.
- Better equipped mobile work force.
- Improved mobile work force moral.

- More timely availability of information at all levels of the resource hierarchy.
- Improved customer satisfaction.
- New ability to implement a job management strategy based on analysis of results, heretofore not possible with current technology.
- Facilities Maintenance Domain Differentiators.

The following represents some of the concepts to be implemented for a Facilities Maintenance vertical domain. Most of the concepts will apply to many other mobile work force applications.

## Initiation

Implementing a maintenance management system typically involves defining a coding structure into which all relevant work targets to be managed by the system must be catalogued, and into which the definition of tasks for those targets must be entered. MasterLink© has incorporated a flexible coding structure for users based on the Construction Specification Institute standard. This is the standard used in architectural design when facilities are specified in formal blueprints and schematics, and provides a coded structure and descriptive data for all typically managed facility targets. This is implemented as a Meta Model which can be extended by the user to define new categories of work targets and their relationships to other categories. In addition to pre-defined categories of work targets, a similar model provides a pre-defined collection of tasks to be applied to related categories of targets.

## User Defined Policy / Effectiveness Reporting

The ability to define the rules and constraints associates with the behavior of the active agents associated with the management of jobs and resources in the system is unique to MasterLink©. This includes the ability to generate "what if?" analysis, and various management reports reflecting the effectiveness of a given work management strategy. Additional management reporting allows for assessment of the performance of resources and targets.

## Planning

Generation of planned maintenance jobs and planned work schedules based on a set of rules defined by instances of Work Process Specifications (Policy) are handled by a system agent. The agent can be run in planning mode for forecasting, or in standard mode which produces actual work.

## Scheduling

The assignment of a Resource to a task/job based on a set of rules and constraints defined by instances of Work Process Specification (Policy) are handled by a system agent. This includes the creation/update of regular shift oriented Work Schedules for groups of Resources known to the system. The agent can be run in planning mode for forecasting, or in standard mode which produces actual work. The agent is invoked automatically based on events occurring on the system having to do with job states. Examples of job events

are: an assignment may be needed for an unplanned task/job that has just been created, or a reassignment may be needed if a currently assigned Resources availability changes.

## Dispatching

The delivery of task/job assignments on work schedules to the assigned resources is handled by a system agent. This supports a store and forward mechanism for server to client delivery.

## Work Distribution

Allows for planned tasks/jobs to be distributed over cyclical periods of time, and across groups of locations where the targets of work exist. This insures that all locations are visited on a regular basis, allowing for better and more timely information about the state of targets at those locations.

This is a partial list of the features distinguishing MasterLink© from other mobile work force applications, and additional information can be provided on request.

Meeting with Richard Licursi 10-20-97 with K. Weimer
CEO & Chairman of Phoenix Wireless Group

I am to call Richard on Tuesday 10-28-97 to set an appt.
He is seriously considering funding Masterfonk himself personally.
This company is emerging and will more than double from
$7,000,000 to approx 16 or 17 million next year. Phoenix info sent to
you 10-21-97 by Phoenix.
He used attorney Bill Grimm same one Crosby uses that Joe & I
met with a few months ago.

Richard wants to see the following things from us:
   1. Competitive Analysis
   2. How we will utilize funds
   3. More detailed business plan including providing
       the rest of financial detail.
   4. He wants to meet you guys.
He feels there may be a fit later for MC with Phoenix Wireless.
He has suggested to keep MC on its own for now, with him
investing. He has another co. Trident.
   "I have seen stuff similar I think." "How is it different?"
   "I need to understand how you are different.

He has raised 18,000,000 venture capital for Phoenix and his
company is evaluated @ $40,000,000 now.
Richard suggested he could get us (Joe & us) with the right venture capital
people.

10-30-97 Richard ... meeting ... per ...

... provide rest ⬤ ... financial detail

∇ Need to understand ... How different

① Competitive analysis?

④ Meet your guys. Call 1 week from tomorrow. to get that.    Call Tru... next web.

② How to spend $? Funds utilization

③ More detailed Business Plan.

NC Keep on its own.                    Trident another Co.

Per Richard francis I have seen stuff similar, how is it different?


10-31-97

Will get back to us on Wed. 11-5
Per Barry make it more simple just like Phil Crosby suggests in his endorsement letters

# MasterLink
## Work Automation & Simplification

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Mr. Richard Licursi
Chairman and C.E.O.
Phoenix Wireless Group
2300 Maitland Center Parkway, Suite 200
Maitland, FL 32751

October 31, 1997

Dear Richard,

This is not trick or treat!  Happy Halloween!

This business plan is in development and you are getting first look it will be revised and delivered when we meet the week of November 9, 1997 or sooner if you wish.

As you can appreciate, this business case is evolving and your input will be valuable.  When you look over the financials note that I have included ranges I, II, and III.  Units sold in each are 28,000, 40,000, 100,000 over a 5 year period.  In the U.S. alone there are 20 million mobil workers and they need help.  The market is definitely there.  If my arithmetic is correct ½% = 100,000 and our range I at 28,000 units makes for a nice business.  However, we are not going to be satisfied at that level.  Yes, we are excited about the challenge and the opportunity that lies ahead for MasterLink!

We are looking forward to meeting with you.

Sincerely,

Kent A. Weisner

Enc. Business plan (17 pgs.), MasterLink Products Application Overview (pgs. 5-9 from white paper)
    Pro Forma Financial Assumptions – Income Statement, Cash Flow Statement, Unit Revenue Schedule
    (15 pgs.)
    Physical Architecture for a Distributed Workflow Management System (1 page)
    MasterLink Presentation Slides (5 pgs.)

## 1. 0 Executive Summary

MasterLink is event driven software that focuses on getting essential information to and from the individual performing work. Task performance is recorded in real time. Both the worker and the enterprise are regularly made aware of expectations and results. MasterLink keeps score and guides job management processes toward the most cost-effective channels. The operating system permits more effective management direction. MasterLink operates via the use of agents. These agents control the behavior of the system automatically following the policy "rules" that influence outcomes within the enterprise. MasterLink is particularly useful in remote and/or mobile worker environments. The open architecture of the MasterLink design avoids the current and increasingly frequent difficulties in planning scheduling and dispatching functions experienced by common data centric work management software systems. MasterLink is knowledge-based software incorporating essential elements of Object Oriented Technology and Artificial Intelligence Agents to achieve its seamless functionality. MasterLink provides an infrastructure necessary for an enterprise to achieve a higher level of sophistication in its operations. Software development cost is escalating rapidly. The code reuse inherent in the MasterLink design significantly reduces this cost spiral.

## 1. 1 Objectives

1. Obtain $2,500,000 funding for initial startup costs and completion of last stage development coding of MasterLink core software in Object Oriented Frameworks that provides generic (universal) code that is 85% reusable in multiple work domains.
2. Complete intelligent layer of core software (6 months).
3. Completion of the core software coding (18 months).
4. Achieve first year sales revenue of $1,775,000 in 1999.
5. Achieve second year sales revenue of $8,480,000 in 2000.
6. Achieve third year sales revenue of $20,425,000 in 2001.
7. Achieve breakeven within 18 months of initial product rollout in the year 2000.

## 1. 2 Mission

MasterLink is the work process improvement company. Our software is dedicated to automating and simplifying work by providing both management and the work force with interactive real time information they need, at the point of work or service, to get the job done right. Currently millions of mobil workers don't have the information they need to do their jobs efficiently. MasterLink's software system changes all of this by getting workers (mobil or stationary) the information they need so everybody knows what to do. Generic by design, MasterLink is applicable in domains wherever work is performed. The company is committed to improving man's ability to perform work worldwide. We are

confident we will generate an attractive rate of return for our investors and be able to continue developing unique solutions for our customers.

## 1. 3 Keys to Success

The keys to success in this business are:
1. To have a saleable product. Our marketing efforts to date have consisted of presenting the design and concept of MasterLink to a wide variety of business organizations. Response has been extremely favorable.
Among those clients we have received offers of beta site, product utilization, and intent to purchase when available. Examples of intent to purchase include clients from medical facilities, aerospace, and the mobil worker environment.

2. In advance of product roll out it will be necessary to develop a strong field support organization.

3. It is essential that MasterLink convey high product reliability with a strong responsive technical support team.

## 2. 0 Company Summary

MasterLink will sell software that is designed to automate and simplify work process and workflow management. It is designed to uniquely permit transfer of essential information to the worker and allows management to manage more efficiently in a real time knowledge based system.

While MasterLink is useful in any work environment, the company will initially concentrate on the following domains:
1. Facilities Management
2. Healthcare
3. Aerospace
4. Communications
5. Utilities
These domains are characterized by a mix of manufacturing, and or service functions and will include both on site and or mobil work forces. This is not a mutually exclusive list. There are many other attractive domains that we will pursue such as entertainment and manufacturing.

## 2. 1 Company Ownership

MasterLink is a "C" corporation. The principals include Kent A. Weisner, Garry Fenimore and John Hartman. The organization is structured to provide the essentials of management and technical expertise. There is a longer-term intention to take this enterprise public. The product growth potential is global.

## 2. 2 Startup Summary

See Attached Pro Formas. MasterLink must complete the late stage coding development. This will permit broader based applications since approximately 85% of the basic core are reusable. Each new domain application will require about 15% replenishment coding to complement the domain specificati9on for each business category. Reusability is one of the benefits of the MasterLink design. The business specification tools provide the necessary input to lead the developers into proper system refinement for each new application. The costs are detailed in the proformas. They are briefly synopsized here to highlight the primary fiscal needs for the start up processes. The funding requirement is $2.5 Million. Details are listed below.

1.  Final stage coding (7 programmers plus 1 supervisor and a Q/A tester) total-----$1.2 million for 18 month development time.

2.  Intelligence layer completion as part of the dual track development program will be completed within the first 6-8 months for this development phase.

3.  Marketing costs (includes pre and post roll out expenses. $1.0 million. This effort combines continuity with existing candidates as well as new client networking.

4.  Sales expense $0.3 million.

## 2. 3  Products and Services

MasterLink is a breakthrough in the direct management field. It is an event driven software tool that provides information needed by the work force, at the point of work or service on a real time basis. Everybody knows what to do and when to do it. Rules and policies plus job state target & task definitions permit management to be more specific in providing work instructions. MasterLink software is adjustable and extensible to the changing needs of the client company.

MasterLink personnel will provide installation and training for client users. Long term support is essential to user satisfaction. MasterLink fully intends to provide best practice advice to its clients in support of their internal efforts. Emancipation not dependency is one of MasterLink's deliverables.

In applications involving mobil work forces the knowledge based process centered system results in the following benefits:
1. Increased efficiency in every phase of a job life cycle.
2. Reduced personnel requirements, allowing for expanded workload or

redeployment of resources.
3. Better equipped mobil work force.
4. Improved mobil work force morale.
5. More timely availability of information at all levels of the resource hierarchy.
6. Improved customer satisfaction.
Any industry segment that is characterized by mobil work forces will find
MasterLink an important addition to management/worker functionality.

## 2. 4 Company Locations and Facilities

MasterLink is currently located and operating at 3649 All American Blvd.,
Orlando, Florida 32810. Office space is currently adequate for initial
development activities. This facility is expandable as management, sales, and
marketing requirements increase.

## 3. 0 Products and Services

See 2.3

## 3. 1 Product and Service Description

MasterLink is a provider of software and management support services. The
software is an event driven system that focuses on getting essential information to
individuals performing work. In so doing, management becomes more effective
and efficient and the work force improves its task completions in the most cost-
effective manner. MasterLink keeps score and up dates "the how am I doing files
on a real time basis". Both the worker and management have a regular and
accurate sense of enterprise achievement.

MasterLink's interactive software provides real time information, where and as
needed. Job tasks are completed more effectively and efficiently. This achieves
the primary purpose of any enterprise. The software is a management tool. It
controls costs; permits simulation ("what ifs"), advantageously alters systems
behaviors, and keeps score. Information goes in from the bottom up (work status)
and the top down (policy, rules, & job state, target and task definitions). The
system processes are dynamically linked and constantly updated in real time, so
everybody knows what to do. Everyone in the enterprise is able to judge the
effectiveness of their contribution. Management can continually evaluate overall
achievement of stated objectives and goals.

Generic by design, MasterLink crosses all lines and is applicable wherever work
is performed. It is universal and opportunity is world wide in improving man's
ability to perform work, as we know it.

MasterLink evolved by two fundamental disciplines; object oriented framework
technology and behavior controlled agent technology. These drive our definition

& rules based expert system used to control job state transitions.

To accommodate transition and utilization of existing legacy systems MasterLink has in development a slide in intelligent layer that integrates with existing M I S to raise current systems to a higher level of performance.

MasterLink represents a distinct philosophy of organizational workplace management and its core is facility management (facility being defined as any infrastructure, physical or logical, that enables enterprise activities). Enterprise endeavors are viewed as "chains of activity". These chains have specific beginnings and endings that, depending on how well they are coupled with each other, are directly related to overall success of the enterprise.

An example of the problem is mobil workers of the world cannot access the information needed to complete work assignments efficiently. Existing data centric systems with disjointed records causes this and reduces management's ability to properly influence workflow process.

The solution is MasterLink software. This new technology transforms traditionally "inert" and disjointed records into "active records". These records, dynamically linked, become integral components involved in the work expediting process. The MasterLink provides mobil workers with hand held wireless access to information needed to perform job tasks (work) optimally in the most efficient, cost-effective manner. MasterLink automates and simplifies work using an event driven, knowledge based and process centered system.

See addendum MasterLink Products-Application Overview for an expanded view of breakthrough technology. (Pages 5 through 9 White paper)

## 3. 2  Competitive Comparison

We at MasterLink have extensively reviewed work process management software. We have found elements of Object Oriented Technology and Artificial Intelligence employed in some software offerings. These technologies have been used to achieve specific, narrowly focused business solutions in some companies. We have not turned up any software products that integrate system agents in the fashion of MasterLink. The MasterLink open architecture design provides flexibility and permits the enterprise to alter the policy and rules that direct the system behavior. A company can literally reinvent itself if needs and circumstance warrant dramatic change. Indeed MasterLink is structured to recognize the need for altering system behavior and signals that need to management by continually assaying the strengths and frailties of the business operations. The use of an intelligence layer is another unique feature. The MasterLink design utilizes agents to interface with legacy data and extract that which is useful to the conduct and behavior of the system.

## 3. 3 Sales Literature

Promotional materials produced to date have been primarily used informational. The graphics and the accompanying descriptive product and services information were prepared for presentation purposes. These materials will remain central to an expanded promotional materials library that is being considered and will be developed as sales and marketing aids.

## 3. 4 Sourcing

The cost of providing the various services and charges for the installed MasterLink software is anticipated to vary substantially from client to client. A billable assessment, (designed to be folded into project cost following acceptance of the project by the client) is needed to establish the domain specification requirements. The specification process will define the scope, complexity and resource requirement to successfully install a functional MasterLink system. MasterLink should not be viewed as installable from a set of floppy discs or a CD. It is a sophisticated amalgam of human and machine coordination to achieve desired best practice in workflow process operations. The proformas included with this business plan detail cost and revenue streams from a mobile work force environment.

## 3. 5 Technology

There are two primary technology elements that have been employed in the open architecture design of MasterLink: Object Oriented Technology and Artificial Intelligence Agents. These elements are uniquely combined and employed to provide a decision methodology that automates the work process. The end result is a smooth delivery of essential information to the individual(s) doing work and permits management to manage the enterprise more efficiently. While neither of the integrating technologies is proprietary, with MasterLink, the design and open architecture as well as the core when coding is complete would be extremely difficult to duplicate. The key elements are the use of object-oriented frameworks and intelligent agents. These are unique to MasterLink. Another developer would find it difficult and time consuming to duplicate the MasterLink design. This leaves the window of opportunity open for MasterLink to take a commanding lead in the market place.

## 3. 6 Future Products and Services

Masterlink will have an advanced position in the application of Object Oriented Technology and the use of Artificial Intelligence agents. The ability to package these as engines to drive specific application developments within an enterprise will become increasingly attractive to Masterlink and its customers. Quality management agents are perceived to be among those most in demand and will

contribute handsomely to an evolving product line utilizing OO and A/I by
MasterLink. *[handwritten: Facility Management Agents are now being equipped and will provide more competitive advantage, on the drawing board is a contract management agent which will be an addition tool for government contracting such as Lockheed Martin or Boeing/McDonnell Douglas]*

## 4.0 Market Analysis Summary *[handwritten: would add]*

MasterLink examined target markets on the basis of magnitude of potential. This software has application wherever work is performed, i.e., universally. Certain work domains clearly held our attention in terms of economic scope and diversity of application opportunities. In each of our selected markets, the number of segments and sub segments within a market were part of the "attractiveness quotient". Facilities management, Medical, AeroSpace and utilities were among the most attractive. Presentations, (concept selling) have been made to organizations including The University of Florida Shands Hospital, Lockheed Martin, Ro Ted, Curran Care, The University Health Consortium and the lawn *[strikethrough]* maintenance industry. The existence of organizations with large remote and /or mobile work forces were also a marketing attraction for MasterLink. Market size and potential for Masterlink is clearly in the Billion Dollar ranges. Whether the size is 3 billion or 10 billion is a pleasant *[handwritten: opportunity]* .

## 4. 1 Market Segmentation

MasterLink will focus on specific pieces of the medium to large commercial facilities. We will concentrate on four basic types of facilities and users.

1. Corporate Facilities Department: Many corporations maintain large facilities for their manufacturing, retail, or high tech operations. Some of the bigger players include Lockheed Martin, Boeing, Bell South, Wal-Mart, and Deere & Company. The top 50 in this group own and operate facilities of over 300 million square feet.

2. Building/Owners/Management Firms: These are "full-service real estate firms capable of taking buildings from inception to market, leasing and management, and often disposal too. Big name players include Trammell Crow, Equitable RE Investment, and The Prudential. The top 100 firms in this class control facilities over 1.2 billion square feet.

3. Building Management Firms: The challenge of increased competition and reduced billings has given birth to a range of specialty niche managers and a new breed of national service providers. Top firms include Network Management, Koll Services, Cushman & Wakefield, JMB Realty, PM Realty, and CB Commercial. The largest 100 firms in this class control over 1.1 billion square feet.

4. Government Agencies/Universities: Not surprisingly universities, along with local, state, and federal governments, play a dominant role in the real estate market. Some of the biggest include the General Services Administration, Ogden

Government Services, State University of New York, State of Missouri, and Los Angeles County. These types of agencies maintain over 1.6 billion square feet.

Because of MasterLink's generic applicability we will pursue several different domains as highlighted in 2.0. Our target companies are large enough to need the high quality work automation simplification technology we offer. We will target entities with large mobil workforces (200-10,000) that require our product to achieve workforce automation.

## 4. 2   Industry Analysis

The commercial facilities market is in dire need of new technology to improve physical asset maintenance/management to satisfy their tenant/customer. The Commercial Facilities Industry represents over 40 billion square feet and spends over $325 billion dollars in costs of operations. These expenditures do not include military or heavy manufacturing types. Global competition and collapse of the real estate of the late 80's and early 90's has brought full recognition to the importance of Facilities Management cost control and the necessity of productive efficiency.

### 4. 2. 1  Industry Participants

There are several competitors who sell Computerized Maintenance Management Systems (CMMS) and Computer Automated Facilities Management Systems (CAFM). A complete listing of these companies are available. They have failed to assist management and ownership in protecting their investments and have failed to meet user requirements in these key areas: implementation costs, manage effectiveness, return on investment, ownership costs, worker productivity, and worker satisfaction.

MasterLink's new leading edge technology solves the chronic problems of Facilities Management.

### 4. 2. 2  Distribution Patterns

We will use strategic partnerships in each work domain to access customers needs, sell, develop and implement our software and services nationally and globally. MasterLink is cutting new ground and distribution patterns will develop prior to rollout.

### 4. 2. 3  Competition and Buying Patterns

The major player in computerized maintenance management systems (CMMS) is Data Stream of Greenville, S. C. and they have over 40% of the business. Current CMMS systems are data centric, mostly a one-dimensional and according to an Aerospace Logistics Manager, woefully inadequate. Today, these systems are still

being sold because nothing else is available and people are continuing to get less of the information they need to do their work. Information accessibility in remote areas is a serious problem for mobil workers. Our market contacts from healthcare to aerospace have confirmed if a better product were available they would buy it. An aerospace manufacturer has confirmed they will use our product when available in both short and long range projects. They are limited in buying commercial off the shelf "cots" software a government contract regulation since 1994. Many businesses have been disappointed with software that does not perform. Competition has yet to produce a process centered knowledge based system with active records that provides real time information, at the point of work, ~~from a process centered system such as MasterLink.~~

### 4. 2. 4 Main Competitors

In terms of direct completion on a product similarity basis, MasterLink has no current competition. There are developers that are clearly aware of an emerging need. Work process operations are on a collision course with "data glut". Information necessary for the efficient discharge of tasks (work) are increasingly difficult to extract and transmit to the individual performing the work. Useful proprietary knowledge is often retained at the work level and never finds its way back into the management system. Each industry segment tends to have software suppliers that are "vendor acceptable". Our competitive evaluation indicates that vendors tend to approach customer solutions using a band aid approach. Software solutions frequently treat symptoms rather than route cause. MasterLink expects to have competition once the impact of its software is perceived. It is the company's intent to establish a major beachhead well in advance of significant competitive activity.

### 4. 3 Market Analysis

See Market Analysis Summary. This topic will be expanded on at a later date.

## 5. 0 Strategy and Implementation Summary

Because of vendor preference in industry segments, MasterLink will seek strategic selling partners in each of its target markets. The domain specification requirement is a precursor to effective installations of MasterLink. This clearly supports the strategic partner approach. As a knowledge based system, it would require enormous time and effort for MasterLink to acquire the knowledge and sophistication for the variety of target markets it chooses to enter. We intend to partner with those who already have a successful sales and market presence in each targeted industry segment.

## 5. 1 Marketing Strategy

We are focusing on the medium to large business segment. Our users need to

continually improve productivity. Our strategy is to highlight how MasterLink is an event driven management tool that delivers timely, required information to the mobil worker so they can do their job efficiently "achieve best practice". We will emphasize that MasterLink is a comprehensive management system targeted to achieve greater productivity from any business organization. A demonstration will dramatically represent how the heart of the system improves and simplifies the collection and distribution of operating information.

## 5. 1. 1 Target Markets and Market Segments

We will focus on Facilities Maintenance Management that is the software core for our comprehensive management system. The need for more sophisticated systems makes it a natural choice.
We will pursue:
1. Lockheed Martin Aerospace, Facilities Management.
They have a use for our product when completed in projects that are both short and long range.
2. Medical Facilities, i.e. Shands Hospital.
All medical facilities need help. Shands is a member of The University Health Consortium, which has as its members seventy of the largest medical schools in the country. Shands has agreed to be our beta site.

These two targets will be our launching pad. As our product is completed, our target markets will expand vertically and to other domains, as we are able to develop strategic partnerships to handle them.
For pricing see Pro Forma subscription sales and direct license sales.

## 5. 1. 2 Pricing Strategy

It is anticipated that the majority of sales will be from Subscription sales, however, direct license sales may reach as much as 30% or more of sales excluding set up fees. Subscription sales will eliminate initial cash outlay and protect the customers from hand held device obsolescence. It is anticipated that the hand held units will be trashed due to technological advances and this should enable us to leverage the preferred subscription sale.
Subscription Sales unit revenue is based upon $250/month/seat or $3,000/unit/year.

Unit/revenue

| | |
|---|---|
| Price/Unit/Year (incl. set up) | 3,000 |
| Cost/Unit/Year | |
| Variable: | |
| Air Time | 900 |
| Server Time | 300 |
| Land Lines | 300 |
| Market Partners | 300 |
| Total Cost/Unit/Year | 1,800 |

|                    |     |
|--------------------|-----|
| Fixed (set up)     | 500 |
| Profit/Unit/Year   | 700 |

Direct License sales would be:  @ $500 for each Mobil unit.
@ $5,000 per server for every 25 units.
@ 10% annual maintenance fee (based on original Implementation Revenue)
Direct sales pricing is being studied and will be set to not materially affect financial results of the proforma.
The variable unit costs are decreasing due to technological advances and competition. Adjustments will be made as we go to market to accurately show true cost, maintain margins, and provide our customers with value delivered pricing.

This section is in development - see Pro forma.

## 5. 1. 3 Promotion Strategy

To maximize MasterLinks visibility and to leverage the product globally we have sought and received endorsements from two global leaders Mr. Philip Crosby, Author and father of Total Quality Management and Mr. Peter Schutz, former CEO of Porche A.G., a global management consultant and lecturer to YPO & TEC groups.

"MasterLink is a computer era breakthrough that lets management manage the operation while the workforce has the information to be fully utilized."
Philip Crosby, Author
"MasterLink is a comprehensive management system, targeted to achieve greater productivity from any business organization. It will be an -on line- method for everyone in the company to know -what is expected of me around here- in an active manner!"
Peter Schutz
High level endorsements and referrals will be two primary ways for us to achieve national and international recognition and account penetration. At the proper time, coordinated with product roll out appropriate press coverage for our breakthrough technology is available and will be sought. A press tour to assure national coverage is being considered but may not be necessary. Advertising expenditures will be minimized and low cost exposure will be pursued.
*   Initially product and promotional literature will be produced to promote MasterLink. The $25,000 budgeted for advertising will be spent in the first year primarily for this purpose.
*   We will attend 6 trade shows and we are still evaluating which ones we will attend (2 for Technology, 4 for Sales & Marketing Development).

## 5. 1. 4 Distribution Strategy

We will partner with those that have a successful sales and market presence in each targeted domain. We will use these partners in each vertical domain to help us develop our accounts, implement, service, and distribute our products.

## 5. 1. 5 Marketing Programs

We must highlight the contribution of MasterLink's unique Architectural Framework created by advanced object-oriented and intelligent agent technologies. To do this we will use the following Marketing Programs which are non exclusive:

* Executive Selling Program
   -The challenge here is to develop a comprehensive executive selling program that conveys the MasterLink message in a non-threatening, and non-technical terminology. The value of MasterLink must be carefully communicated to assure acceptance.

* Value Delivery Partner Development Program
-MasterLink believes that the most efficient sales channels exist with current technology manufacturers and providers.

* Strategic Competitive Advantage Program
   -Partners here would invest in the MasterLink Set to have exclusive rights within their vertical market, to utilize MasterLink to gain or maintain competitive advantage. MasterLink will be a "value partner" whose compensation will be based on the positive economic impact to the partners' enterprise, as defined by mutually agreed upon benchmarks.

*Industry Technology Innovator/Marketing Partner Program
   - These partners will adapt MasterLink to their domain and partner with MasterLink to market new technology to their industry.

   -

*Venture Development Program
   - MasterLink will sell the rights for particular vertical implementation to this partner who would be free to apply this technology however they wanted. This partner will be able to use MasterLink as a technology booster, or develop a whole new business unit around the product set.

   -

*Industry Trade Group Program
- Members through company sponsorships or individual memberships fund these organizations. The groups we will solicit such as: University of Health Consortium (70 large university hospital members) and Electric Power of Institute utilize member funding to develop new technologies that are made available to its members. This program will be designed to point out how MasterLink can add significant value to scenario because its foundational sign is generic, i.e., work management. We will show how easily MasterLink adapts to any vertical market by utilizing the "domain experts" within a given industry.

## 5. 2 Sales Strategy

1. Establish MasterLink in the market place.

2. Secure capital funds to code MasterLink.

3. Establish Value Delivery Partnerships.

4. Increase market awareness of breakthrough technology.

5. Sell our products and services beginning with client strategic evaluations, assessments, exploitation planning, software sale & implementation service, support, third party products, mentoring and technology transfer.

6. Establish MasterLink Collaborative Agent Workflow Framework as a "quantum leap" in providing competitive advantage. This is the first complete physical architecture for a distributed workflow management system. This was done by using advanced object orientation and intelligent agent technology.

### 5. 2. 1 Sales Forecast

Our sales projections are listed in our proforma income statement under revenue and in the cash flow statement under sources of funds. Sales are based on mobil worker subscription estimates per year. 80 % of current year subscriptions are assumed carried to the following year (20% attrition rate), and added to new unit estimates for that year.

A partner and customer/user of MasterLink achieve initial sales revenue of $1,000,000.

Sales revenue is based on the average units per year (or total subscriptions as of July 1) times a per month/per unit cost of $250 ($3,000 annually).

Implementation revenue is a charge to a customer group to cover the cost of completing implementation for that customer. Starting year2, charges of $250,000 per major new account are assumed.

Set up Fees are one-time charges per subscriber to cover the upfront costs of the remote device hardware and software. They are assumed paid when a new subscriber is added, at a price of $1,500 for each new unit added that year.

### 5. 2. 2 Sales Programs

1. We will establish accounts by satisfying our beta site and securing endorsements and referrals from each implementation.

2. Establish MasterLink's unique quantum leap paradigm shift by getting this recognized nationally and globally. Approach the proper channels to secure last stage funding from a key investor, strategic partners and/or venture capital entity.

3. Develop strategic vertical industry partnerships in each domain to market, sell, and implement MasterLink.
 Land accounts in Industry Trade Groups, i. e. UHC & EPRI members
  - Medical Hospital Facilities Accounts
  - Utility Accounts
 Sales programs are more detailed in our white paper and it is available upon request.

## 5. 3  Strategic Alliances

We will seek strategic alliances and partnerships with the leader in each domain we decide to pursue. We intend to work with the domain "experts" in every market we enter.
We will require above average performance and reward delivery of partnership agreement goals. Partnership agreement documents are being developed.
Sales & Marketing responsibilities have been given to partner Kent Weisner and his company A-Tek Consultants, Inc. on a commission basis @ 15%. These commission figures are so noted in the proforma.
A-Tek has been supporting the efforts of MasterLink and will continue to do so to achieve our collective goals.
Our efforts for endorsements have paid off with the endorsement and continued support of Philip Crosby, Author, and Peter Schutz, Global Management Consultant.
The University Health Consortium has signed our non-disclosure agreement and given us a letter of support and encouragement because of the dire need of solutions a completed MasterLink could provide to the Home Healthcare industry and particularly to its members. A copy of their letter is attached.

## 5. 4  Service and Support

Support is very important in our corporate strategy. We will use the best available personnel for this responsibility. Server Support and Tech Support are provided for in the proforma under personnel. Our domain
partners will also share in providing support to our customers for their respective domains.

## 5. 5  Milestones

## 6. 0  Management Summary

MasterLink Corporation is cautious in hiring new people. Our three founding partners are very loyal to each other and will be to those who we hire. Two part-time employees are used. Importantly, we have access, as required, to highly skilled technologists with deep root experience in the large-scale application of object and agent technologies.

Concurrent with funding our immediate plan is to hire 5 programmers. In the third month, we will need to hire 1 part-time QA tester who will roll to permanent as required. Coordinated with product and corporate development our staff will grow to 11 by the end of 1998. Three years from now, we should have a staff consisting of 23 employees excluding our sales force and support personnel which will grow as required to deliver the sales growth and support as the business is generated. The company will use its domain partners to large extent in developing sales and support. The additional hiring will be done to complete the final phase of product development, develop and penetrate our market, ~~and~~ *develop & secure a* partners, and manage the business operations.

## 6. 1 Organizational Structure

The MasterLink organizational structure is designed to implement a philosophy that views the corporation from three functional areas, i.e., marketing/sales, administration, and product development/services, and three management levels within each, i.e., policy, control, and operations.

We intend to focus our entire organization on delivering the best possible service to all participants in the Value Delivery Chain. We will use the "best of the best" information technology and hire the highest caliber personnel available to remain extremely well managed.

## 6. 2 Management Team

Garry Fenimore is the founder and president of MasterLink. Mr. Fenimore brings proven management skills from the industrial manufacturing, services, and real estate environments. He fulfills the essence of the domain expert, and is the inventor of the MasterLink design specification. He has 11 years experience as a technical facility specialist and one of his employers were The Siemens Corporation. His experience with computer aided facilities management (CAFM) and computer aided maintenance management (CMMS) led him to the conclusion that these systems were data centric, inhibited management innovation and led to increases in departmental costs. This led him to the creation of MasterLink.

John Hartman is chief technology officer for MasterLink Corporation. He brings 15 years of functional systems analysis, design, and project management skills. He is currently serving as Director of Systems Technology for a Fortune 500 company. As an advanced object and intelligent agent technology specialist he serves as the "advanced

*I want his complete title here*

object and agent evangelist" for design methodology and technique in all production areas of MasterLink. He is the founding manager of his company's Common Object Technology Group, which is currently a key enabler in a $30 million dollar, long-term strategic downsizing and client/server migration effort. The latest projects headed by Mr. Hartman are achieving dramatic results; with as much as 90% of program code being reused in new product releases.

Additional support is provided by Steven Beaver an object oriented software development specialist. He has designed, developed and implemented middleware which supports the basic functionality required to implement Business Applications in an object oriented environment. His work for The Technical Resource Connection, Inc. helped result in the sale of TRC to Perot in 1996. He brings additional expertise in Object Oriented and Artificial Intelligence Technology to MasterLink.

Kent Weisner is in charge of business development for MasterLink. ~~He brings 20 years of successful business management, business ownership and entrepreneurial and start up business experience.~~ Typically, he has total dedication and commitment to achieve MasterLink's objective.

The principals of the company are supported by a number of highly skilled individuals possessing both technical and marketing capabilities. A-Tek Consultants, Inc. is a supplier of professional software services. This business is owned by Mr. Weisner and will be a source of support personnel for MasterLink.

## 6. 3 Management Team Gaps

## 6. 4 Personnel Plan
*See Personnel listed on ProForma*

## 6. 5 Other Management Considerations

## 7. 0 Financial Plan
*See Pro Forma*
*MasterLink will be able to finance its own growth after product is funded by recurs of late stage funding*

## 7. 1 Important Assumptions
*See Pro Forma Financial Assumptions are detailed.*

## 7. 2 Key Financial Indicators
*MasterLink is a software start up. See Pro Forma for indicators*

**7. 3  Break-even Analysis**

*See Pro Forma*

**7. 4  Projected Profit and Loss**

**7. 5  Projected Cash Flow**

**7. 6  Projected Balance Sheet**    *— for ?*

*— for ?*

**7. 7  Business Ratios**    *Do we need these? Think Richard will ask.*

**Subject:** MasterLink
**Date:** Mon, 03 Nov 1997 13:11:26 -0500
**From:** "Kent A. Weisner" <atek@gdi.net>
**Organization:** A-Tek Consultants, Inc.
**To:** Richard Licursi <licursi@pwgi.com>

Dear Richard,

Thanks to you and Barry for meeting with me on Friday.

You had previously asked me about use of funds and reports generation. I am not sure if I covered these adequately. Use of funds are shown in the Pro Forma financials I gave you Friday. We could detail more for you if you require it, in a use of funds statement.

The basis for generating reports is in the design and in MasterLink. We have designed all on what has to occur in workflow maintenance management. Regarding reports, we need the customer to tell us what they want the reports for then, the actual report generating programs will be inserted.

We are looking forward to hearing from you on Wednesday.

Best Regards,

Kent Weisner

Subject:
Meeting...
Date:
Wed, 03 Dec 1997 10:55:54 -0500
From:
"Kent A. Weisner" <atek@gdi.net>
Organization:
A-Tek Consultants, Inc.
To:
Richard Licursi <licursi@pwgi.com>
CC:
Barry Broskowitz <broskowitz@pwgi.com>

Richard,

Thank you very much for meeting with us yesterday. John and Garry
enjoyed getting to know you. We appreciated your thoroughness. I have
more information for you on PAS if you have time to receive it. Also, I
need to speak to them again and would benefit from your experience and
coaching regarding PAS i.e., the right kind of relationship-unrestricted
license,etc.

Under separate cover I am sending 9 pages of market research information
we did last year. Believe this will start to make you feel more
comfortable on this subject. We can provide more current in-depth
analysis if you wish to see more, we have it to share with you.

We are working on your question, "Where can this be in the next two
years?"

John will have the plan emailed to Barry by Friday as agreed.

Kent

Kent Weisner
President
A-Tek Consultants, Inc.
        <atek@gdi.net>
3649 All American Blvd.
Orlando
FL
32810-4726
USA
        Work: 407-299-3900 or 1-888-299-9180
        Fax: 407-299-8200

Barry Brockman's Telecon 11-5-97   • NON disclosure
Agreement

If we could agree,                    change 1st statement
                                       unless we get it in the
How much are you willing to show?      ND from
                                       that party.

We need to understand what you are proposing to do.

     ① Technically viable
     ② Financially viable   Deliverable

     • All documentation

Email to Barry
cc Richard
Afternoon        • All change documents
Telecon

Barry's copy of the logical design [will be delivered tomorrow.]
not the most recent
version John Witt &
will bring it with him when
we meet

It has all the object model

    a thorough
It will give summaries and an understanding of what we
are doing.

Ⓓ  It weighs about 10 lbs.

Contains Complete specs for object, data, & methodology
It is so       you probably
complete      won't believe it. Nobody ever
does it this thoroughly. We did it for several reasons. The first is it
had to be done
... Further anyone we bring in has to commit to doing the same.

This includes ● employees, strategic pa●ers, partners etc. It is not just an expectation it is the requirement.

By the way, one ~~that~~ agent we ~~are~~ are developing is the ~~Quality Mission~~ Agent another is the contract ~~Costs~~ Management Agent.

Neither of these ~~two~~ exist yet and are badly needed as quality is not being ~~managed~~ as it ~~needs to~~ be, nor are contract costs being ~~managed~~ & controlled. Both of these areas are juicy opportunities that will fit right in with Metafisk's work process management automation.

Things added to Bus Plan - will bring revised copy.

Revised 3.5 Technology

Added 5.5 Milestones

Revised 3.6

Added 6.0 Mgt. Summary.

Revised 6.2 Mgt. Team

~~Added 6.3 Mgt Team Gaps~~

Added 6.4 Personnel Plan - will add more - refers to ProForma

Added 6.5 Other Mgt Considerations - directors lists

7.0 — 7.7 Refers to Pro Forma & Pro Forma Assumptions

# MasterLink
*Work Automation & Simplification*

MasterLink Corporation
3649 All American Blvd., Orlando, FL 32810-4726
407/299-3900 • Fax 407/299-8200 • E-mail: atek@gdi.net

Mr.Richard Licursi
Chairman & C.E.O.
Phoenix Wireless Group
2300 Maitland Center Parkway, Suite 200
Maitland, FL 32751

November 6, 1997

Dear Richard,

Today, upon your execution of our Non-Disclosure Agreement we are delivering to you the following:

1. The MasterLink complete specification including objects, classes, methodology, the logical design, all class diagrams, the data dictionary, and MasterLink Use-Case Scenarios. It should give you a thorough overview and an understanding of what we are doing. This is Garry Fenimore's only copy. It has been revised and John Hartman has the original copy. We would like this returned to us after you have had the opportunity to review it to your satisfaction. ( no. of pages - plenty)
2. Revised Business Plan (19 pages)
3. Physical Architecture for a Distributed Workflow Management System (1 page)
   System Architecture Overview (1 page)
   The vision pages 1A, 2A, and 3A
4. The conceptual Specification (17 pages)

We believe you will find the specification and documentation exquisitely complete. We have received a number of compliments on the thoroughness and precision of our specifications and documentation.

We are looking forward to meeting with you next week for further dialogue and understanding. Because Garry Fenimore and John Hartman have to travel across the state an early evening or very late afternoon meeting would be preferred. With this accommodation, we could be available any day next week. The following week, the 18th is out for us.

Sincerely,


Kent A. Weisner
C.E.O.                    cc: Mr. Barry Broskowitz, V. P. Operations, Phoenix Wireless Grp.

# MasterLink
## Work Automation & Simplification

MasterLink Corporation
3649 All American Blvd., Orlando, FL 32810-4726
407/299-3900 • Fax 407/299-8200 • E-mail: atek@gdi.net

PROPOSED MEETING AGENDA

COMPANY PARTICIPANTS: PHOENIX WIRELESS AND MASTERLINK

WHERE: MASTERLINK OFFICES:
3649 ALL AMERICAN BLVD.
ORLANDO, FLORIDA 32810

WHEN:   DECEMBER 2, 1997 @ 4:00 P.M.

Moderator, Kent A Weisner. Principal presenters: Kent A. Weisner
Garry Fenimore
John Hartman
*Ken Woods   Emerging Virtual Hour*

1.Introduction of participant personnel.
2.Masterlink in perspective, a brief review.
3.Product and services description.
4.The software design and how it functions.
   a.  Input functions
   b.  Output functions
5. Work flow management automation and simplification; how it is achieved through Masterlink.
6. Universal application; useful in all work environments.
7. The business plan overview.
8. Dialogue

Meeting recap and next step time table.

*gave Barry Exec Industrial PPT. diskette*
*"    "   link process PPT. + PAS diskette*
*"  Richard & Barry Resource Based Estimates Year 1 to Develop Core Engine — hardcopy.*
*gave Barry Copy of PAS presentation not rec received in B&W hard copy. overview of Pas*
*"    "  & Richard copies of 'Competing for the future with Intelligent Agents*
*Developing Enterprise Systems with Intelligent Agent Technology*
*"   each the Buz Plan & Pro Forma 9/97.*

Send to Young
P.P. Version II

Barry suggests
I help
Tapes or tape as it

Someone to look at Class

Arrange meeting for us / Dec - 2 Tues
after Thanksgiving

4 P.M at our place
All American Blvd.

Richard ? upfront Bus Plan

Barry    whats the product
         How info entered
           "    "   comes out
         Take him thru Flow

         Walk thru business plan on both products

Put together an agenda in the next few days

1. Bus Plan
2. Product

POA ——— cost?
Wireless     storage ? array?

Where are #10 coming from on improvement, efficiencies
                                              cost saving

Front to back product flow

input
output
mobility

---

John

Watson/Link telling National course
- logical design
- Physical Implementation

Project Plan

what has to happen to get to a physical implementation

Invest choose an Architecture (NT Serv which on hand held)
Invest build system physical apt.

Business Case once product Is available
" Solicitation with 1st complete demo

Masterlink Letterhead
tentative Meeting Agenda

December 2, 1997 @ 4 P.M. @ Masterlink Corp. office
3649 All American Blvd.
Orlando, FL 32810

Introductions: Kent Dixon                    [illegible] Richard Sicurti
                                             Barry Finkowitz
for Masterlink Advantages: Why Masterlink?   ?? Peter Stanforth
Gary Ervin
John Huston CTO

Business Plan Presentation / Question & Answer period
○ The Problem                                Kent Dixon
○ The Solution                               Gary Fenimore
High Level PPT presentation: Brief & to the point message

Masterlink Product — What is it?            John Huston &
                                             Gary Fenimore
Low Level Detail    How information is entered
High Level picture   "    comes out
Physical Architecture for a    We will take you thru the flow.
State Transition — John Huston — [illegible]
Agent contribution to transition flow
one state transition at different levels.

Increased efficiencies at the task does benefit — The Worker
   "      "      "   "   generating level (Scheduling
                                             planning
                                             dispatch
                                             Bof Mgr.
Scott is kept                                the whole supervisory
Change management                            spectrum is
                                             improved.
Improves effectiveness of [illegible] supervision minimal
Workers

Meeting Notes 12-2-97

Barry Broskowitz
Harry Feriner
John Hartman
Ken Woods
Gene Comeau
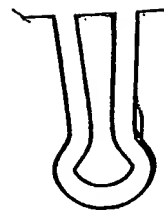
per Barry

Agent not very well defined

Planning + Scheduling not really well spelled out. Agreed and John
explained why they seemed satisfied.

GUI how you get it in          Have you — GUI
    How it comes out           loading system with all the info
         GUI                         people profiles
    John's answer yet to be done.   users involved.
    or one piece

Barry - PQA will determine Screens

By John Agents make intelligent decisions.

                    going to
What are you using for db?  — Object store unless per John
                                 doesn't matter
Market Research then per Richard — We stumbled across.
                            ↓
where can this be in the next 2 years?

Fin Plan — Concern Revenue spikes. Channel list.
    How to fast?

Concept of talent   Find out how to move
    — can you implement? Yes
    — complicated build over the other — venture guys would eat you up.
    — ML would bring their software to them to build.

Paid in cap.? None.

Aware Dep 13 X 3
Resistance to change — 2 big AREAS — may be show stoppers.
1 Training employees
2. old systems - change.

Richard

- Get our thoughts together

I need one more run at this, before the Vectors can guess. They are good aggressive - looking for places to spend - a lot present

How does structure work.

"I'm entered on a personal basis."

---

Need True competitive analysis - reference - Harry

Framing it shorter run. or raise money right away.

Harry evaluating Technology.

Structure that may be difficult with the other entity. Do it without this one route.

The sooner PAS [the better or MC do it itself might be better - PAS would fall apart - splits up when depending on them.

come out of the box and become one entity

Need to understand the relationship better.

Next step - Richard. until Monday. - What we have come up with.

John plan by Friday.

Richard will call Kent on Monday 12/8/97.

# MasterLink
*Work Automation & Simplification*

MasterLink Corporation
3649 All American Blvd., Orlando, FL 32810-4726
407/299-3900 • Fax 407/299-8200 • E-mail: atek@gdi.net

"Personal & Confidential"

December 5, 1997

Mr. Richard Licursi
Chairman & C.E.O.
Phoenix Wireless Group          cc: Mr. Barry Broskowitz
2300 Maitland Center Parkway            Vice President, Operations
Suite 2oo
Maitland, Florida 32751

Dear Richard,

Yes, we have given considerable thought to the impediments that you mentioned relative to resistance to change. We recognize these difficulties. Organizations have traditionally developed operating cultures resistant to change. All to often these organizations suffer the economic consequences when they are late to adjust to changing patterns in the market place. It is our experience to date that there are a sufficient number of companies in a variety of work domains that recognize changing patterns. They are willing to and want to adjust to these changes but as yet don't have a road map. These are our target clients and MasterLink we feel is the solution. It is the needed map & tool, framework if you will, to maximize performance and provide effective change for both the workers & management in an enterprise.

We have also done a lot of what we believe to be significant pre-positioning of the product for potential clients and end users. To this end, we would appreciate your adding this to the MasterLink delivery column in addition to those we presented to you and Barry on December 2, 1997.

You will recall my mentioning Peter Schutz, the former CEO of Porsche AG, he is a global management consultant and a high level business contact resource for MasterLink. He regularly lectures on the need for corporate cultural changes in business. His lectures are frequently over subscribed. This validates our contention that there are a sufficient number of target opportunities for MasterLink. In addition to Peter Schutz, Philip Crosby has endorsed MasterLink as essential to new age enterprise success. We intend to use these two individuals to help spread the gospel. *influence of*

By design, MasterLink intends to minimize change shock by utilizing much of the legacy data within the client's databases. The agent technology incorporated into MasterLink has the ability to extract appropriate and necessary information and to properly the conduct the tasks, jobs, and functions of the enterprise. It is able to assemble input/output information that continuously provides a **score card for the entire** enterprise. An enterprise is infinitely more effective when: 1. Everybody has the information they require to work efficiently. 2. The quality of their individual contribution is known to them as well as to the management. 3. The overall enterprise performance is displayed as a sum of all work contributions. **Everybody knows what is expected, what to do and how to get help.**

When success is shared with those in the organization that contributed to that success that enterprise will become even more successful. This provides the contributors the answer to the question, " if I do what is expected and do it well, what's in it for me?" *direct the behavior and commitment of that*

*performing*

Another key ingredient is to assist our clients in building a passion for success in the business of the enterprise. This is best accomplished by an accurate and self-sustaining definition of, "Why are we here?" When properly defined, the passion to achieve will raise performance to a higher level. Historically, organizations have had a very difficult time accurately answering the question, " why are we here?" Once this is accurately defined, passion to excel is more readily imbedded.

Immutably, old ways must give way to the new. Those who move with the flow will prosper. Those who sit on the sidelines will find survival difficult. MasterLink is positioning its services and software products to cushion the impact of change on an organization. The intent is to do this without hype and with well kept performance reality. The MasterLink design is modular. MasterLink is installable apiece at a time. Its efficacy is established well in advance of totality.

Hopefully, this will assist you in more completely sensing the enormity of the opportunity represented in MasterLink. MasterLink has the technology, the personnel, and the passion to succeed. It now needs the means to move ahead.

Very truly yours,

Kent A. Weisner
MasterLink Corporation

*[handwritten annotation at top right]*

**Subject: MasterLink Competitive Analysis Comments**
**Date:** Mon, 8 Dec 1997 07:38:06 -0500
**From:** "Garry L. Fenimore" <mlink@gte.net>
**To:** "Kent A. Weisner" <atek@gdi.net>

Dear Mr. Licursi,
Thank you for taking time to meet with the MasterLink team last week. We
certainly enjoyed meeting you and Barry, and sincerely appreciate your
interest.

During the meeting you expressed a desire to have more information related
to the competitive market analysis that I did a few years ago. During that
effort, I contacted more than fifty publishers of Computerized Maintenance
Management Systems (CMMS), and received information from more than twenty
of them. They have all taken the basic "here's a set of building blocks,
now define your organization, equipment classification methodology, etc.".
It is the "data centric" view, and not the "process" view that MasterLink
adheres to.

All major desktop CMMS publishers such as DataStream, DPSI, JB Systems, CK
Systems, PSDI, Mapcon, Omni Corp., HSB Reliability, and others, have taken
the data approach. The cost to implement and manage their systems is very
high, and they fail to deliver on promised improvements in productivity.
Consequently, the market for CMMS remains very fragmented and characterized
by "niche" players specializing in very narrow sub-markets, e.g., a small
group of local school boards.

My exposure to mid-range systems (AS400 types) is limited, but I have seen
systems such as J.D. Edwards'. They are even more constraining than the
desktop group (because of programming architecture) and have failed to
address business process.

Finally, one major reason the CMMS market analysis is of limited value is
the fact that we are not just a CMMS. We are a generic work-flow management
system that is process-focused, and enabled by intelligent agents. While we
will ultimately replace them, we do not want to be categorized in a group
that has such a limited future.

Please e-mail me if you have any further comments.

Regards,
Garry Fenimore

Kent,
Any Comments?

● ●

**Subject: [Fwd: Comparative Analysis]**
**Date:** Wed, 10 Dec 1997 08:41:13 -0500
**From:** "Kent A. Weisner" <atek@gdi.net>
**Organization:** A-Tek Consultants, Inc.
**To:** David Frier <duvie@earthling.net>, Garry Fenimore <mlink@gte.net>

```
Garry,
Here is John's input.  Suggest you eliminate his first sentence and
ending and compile it into a true competitive analysis that I can slide
into the buz pln.  How about making your short note to Richard first and
then end it with here it is as you requested.

Competitive Analysis:
    We contacted more than fifty publishers    - etc.

One more thing shouldn't we have something in it on CAFM's too?  Request
u add a little on it.
Thank you!
Kent
```

---

**Subject: Comparative Analysis**
**Date:** Tue, 09 Dec 97 12:06:00 PST
**From:** "Hartman, John" <John_Hartman@tvratings.com>
**To:** "'ATEK'" <atek@gdi.net>

```
Dear Mr. Licursi,
Thank you for taking time to meet with the MasterLink team last week. We
certainly enjoyed meeting you and Barry, and sincerely appreciate your
interest.

During the meeting you expressed a desire to have more information related
to the competitive market analysis that I did a few years ago. During that
effort, I contacted more than fifty publishers of Computerized Maintenance
Management Systems (CMMS), and received information from more than twenty
of them. They have all taken the basic "here's a set of building blocks,
now define your organization, equipment classification methodology, etc.".
It is the "data centric" view, and not the "process" view that MasterLink
adheres to.

All major desktop CMMS publishers such as DataStream, DPSI, JB Systems, CK
Systems, PSDI, Mapcon, Omni Corp., HSB Reliability, and others, have taken
the data approach. The cost to implement and manage their systems is very
high, and they fail to deliver on promised improvements in productivity.
Consequently, the market for CMMS remains very fragmented and characterized
by "niche" players specializing in very narrow sub-markets, e.g., a small
group of local school boards.

My exposure to mid-range systems (AS400 types) is limited, but I have seen
systems such as J.D. Edwards'. They are even more constraining than the
desktop group (because of programming architecture) and have failed to
address business process.

Finally, one major reason the CMMS market analysis is of limited value is
the fact that we are not just a CMMS. We are a generic work-flow management
system that is process-focused, and enabled by intelligent agents. While we
```

will ultimately replace them, we do not want to be categorized in a group
that has such a limited future.

Please e-mail me if you have any further comments.

Regards,
Garry Fenimore

I would like to add some perspective to what Garry has written.  Indeed,
some of the products mentioned above implement the ability to generate
planned maintenance activity based on task frequencies, or to automate the
scheduling process by associating the appropriately skilled resource with
the tasks to be performed.  The way in which these processes occur is
dependent on the perceptions of the designers and programmers who built the
product to perform these functions, and usually allow little if any
flexibility.  MasterLink, through the use of agents and the Policies which
govern their behavior put the user in control of how these processes are
implemented.  Through the graphic user interfaces that allow for flexible
modification of the rules and definitions that agents use to implement their
roles, the determination of the way that work flow management processes
occur is placed in managements' hands.

Another differentiator is the ability of MasterLink to define goals and
objectives which become the basis for measuring the effectiveness of
individual agent decisions, and the effectiveness of Policies overall.  Thus
providing a way for measuring whether the use of the system results in more
productivity or cost savings with one Policy versus another.

A third distinguishing characteristic would be the use of state of the art
architectures and software development methodologies.  One of the basic
tenets of object oriented development is that there is an acknowledgement
that software, just as the real world, is in a continuous state of change.
 We will be able to react to changes in the market place that have an impact
on software quicker and with higher quality than older systems.  Many of
these existing systems have been around for quite a number of years and have
only recently been converted to graphical user interfaces.  The inherent
weaknesses in those systems are therefore much more difficult to address,
and this is one of the reasons that at each potential client we visited
there was some level of disatisfaction with their current systems.

Yours Truly,
John Hartman

Kent Weisner <atek@gdi.net>
President
A-Tek Consultants, Inc.

**Subject: Fw: MasterLink Market Positioning**
**Date:** Wed, 10 Dec 1997 10:52:27 -0500
**From:** "Garry L. Fenimore" <mlink@gte.net>
**To:** "Kent A. Weisner" <atek@gdi.net>, "Barry Broskowitz" <broskowitz@pwgi.com>

----------

> From: Garry L. Fenimore <mlink@gte.net>
> To: Richard Licursi <licursi@pwgi.com>
> Subject: MasterLink Market Positioning
> Date: Wednesday, December 10, 1997 10:14 AM
>
> Dear Mr. Licursi,
> Thank you for taking time to meet with the MasterLink team last week. We
> certainly enjoyed meeting you and Barry, and sincerely appreciate your
> interest.
>
> During the meeting you expressed a desire to have more information
related
> to the competitive market analysis that I did a few years ago. During
that
> effort, I contacted more than fifty publishers of Computerized
Maintenance
> Management Systems (CMMS), and received information from more than twenty
> of them. It should be noted here that Computer Aided Facilities
Management
> (CAFM) are, as far as work management is concerned, essentially the same
as
> the CMMS products. Typically, they have more of an enterprise view toward
> overall asset/financial management that includes machinery, buildings,
> production equipment, etc..
>
> Both groups have taken the basic "here's a set of building blocks, now
> define your organization, equipment classification methodology, etc.". It
> is the "data centric" view, and not the "process" view that MasterLink
> adheres to. Desktop CMMS publishers such as DataStream, DPSI, JB Systems,
> CKSystems, PSDI, Mapcon, Omni Corp., HSB Reliability, and others, have
> taken the data approach. The cost to implement and manage their systems
is
> very high, and they fail to deliver on promised improvements in
> productivity. Consequently, the market for CMMS remains very fragmented
and
> characterized by "niche" players specializing in very narrow sub-markets,
> e.g., a small group of local school boards.
>
>
> John Hartman had some additional thoughts on the issue of "who we are".
>
> Indeed, some of the products mentioned above implement the ability to
> generate
> planned maintenance activity based on task frequencies, or to automate
the
> scheduling process by associating the appropriately skilled resource with

> the tasks to be performed.  The way in which these processes occur is
> dependent on the perceptions of the designers and programmers who built

the
>
> *product to perform these functions, and usually allow little if any*
> *flexibility.  MasterLink, through the use of agents and the Policies*
which
> *govern their behavior put the user in control of how these processes are*
> *implemented.  Through the graphic user interfaces that allow for flexible*

> *modification of the rules and definitions that agents use to implement*
> *their*
> *roles, the determination of the way that work flow management processes*
> *occur is placed in management's' hands.*
>
> *Another differentiator is the ability of MasterLink to define goals and*
> *objectives which become the basis for measuring the effectiveness of*
> *individual agent decisions, and the effectiveness of Policies overall.*
> *Thus*
> *providing a way for measuring whether the use of the system results in*
more
>
> *productivity or cost savings with one Policy versus another.*
>
> *A third distinguishing characteristic would be the use of state of the*
art
> *architectures and software development methodologies.  One of the basic*
> *tenets of object oriented development is that there is an acknowledgement*

> *that software, just as the real world, is in a continuous state of*
change.
> *We will be able to react to changes in the market place that have an*
> *impact*
> *on software quicker and with higher quality than older systems.  Many of*
> *these existing systems have been around for quite a number of years and*
> *have*
> *only recently been converted to graphical user interfaces.  The inherent*
> *weaknesses in those systems are therefore much more difficult to address,*

> *and this is one of the reasons that at each potential client we visited*
> *there was some level of dissatisfaction with their current systems.*
>
> *Regards,*
> *Garry Fenimore & John Hartman*

# MasterLink

*Work Automation & Simplification*

MasterLink Corporation
3649 All American Blvd., Orlando, FL 32810-4726
407/299-3900 • Fax 407/299-8200 • E-mail: atek@gdi.net

*per Barry 29th or 30 with @5 P.M,*
*• Sit Tera*
*• Market Analysis coming along went some how? and at London 29th?*

# Memorandum

**DATE:**   December 12, 1997

**TO:**   [Richard Licursi]

**FROM:**   [Kent Weisner]

**RE:**   [*MasterLink 12-11-97 Telecon*

   *Tentative 5:00 p.m. meeting Monday, December 15*]

**CC:**   [Barry Broskowitz]

*We will respond to the concerns expressed by you during our telephone conversation. Have spoken to the team and we believe the meeting will go a long way to resolving the three big issues. At this end, we can make Monday at 5:00 p.m. work.*

*As a step toward expanding market analysis, you may recall me mentioning Lockheed Martin. The sender of this email to us from that company, manages an area of LMIS assigned to new leading edge technologies. One can expect that he would have a finger on the pulse of the O.O. and A.I. applications that would favorably impact his field of responsibility. Certainly, we have more on product and market analysis which we will be sharing with you next week.*

*Getting MasterLink and CIAK built is our primary focus and the team has agreed to unite as one company. The team has confidence a win win scenario(for you and the company) can be achieved.*

**Subject:** [Fwd: MasterLink possibilities]
**Date:** Thu, 17 Jul 1997 10:14:39 -0500
**From:** "Kent A. Weisner" <atek@gdi.net>
**Organization:** A-Tek Consultants, Inc.
**To:** hartmajd@tvratings.com
**CC:** mlink@mail.gte.net

```
Garry and John,

Here is an e-mail from Randy Dougherty
                       Manager, Logistics Info Systems
                       Lockheed Martin Information Systems
                       12506 Lake Underhill Rd., MP  1270
                       Orlando, FL  32825-5002
                       Tel (407) 306-4812  Fax (407) 306-4010
                       email: randy_dougherty@ccmail.orl.mmc.com

The communication speaks for itself!  Nice job!

Kent Weisner
```

---

**Subject:** MasterLink possibilities
**Date:** Mon, 14 Jul 1997 09:31 -0500 (EST)
**From:** Randy_Dougherty@ccmail.orl.lmco.com
**To:** atek@GDI.net

```
Garry,
Thank you for sharing your concepts for MasterLink work automation.
As I stated in our meeting, the concepts which you presented to me
have some very interesting possibilities for several upcoming projects
that I am involved with for Lockheed Martin Information Systems.  We
are  evaluating products which will assist in the maintenance of
Lockheed Martin end-item products (aircraft, avionics end-items, etc).
 When you are able to advance your MasterLink concept beyond the
initial requirements stage and provide an initial prototype, I am very
interested in seeing how your concept is converted to a implementation
prototype.  The potential for Lockheed Martin Information Systems to
utilize MasterLink to automate our maintenance management systems
processing is very exciting to me.

Again, thank you for your briefing and please keep in touch as your
prototype is developed.

Randy Dougherty
407.306.4812
```

*LOCKHEED MARTIN*

Randy Dougherty
Manager, Logistics Info Systems

Lockheed Martin Information Systems
12506 Lake Underhill Road, MP 1270
Orlando, Florida 32825-5002
Telephone 407-306-4812  Facsimile 407-306-4010
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07/17/97 10:17:47

# A-TEK CONSULTANTS, INC.

### 3649 All American Blvd.
### Orlando, Florida 32810-4726

DATE: _12-12-97_ TIME SENT: _1:15 p.m._

PLEASE DELIVER THIS FAX TO: _Mr. Richard Licursi and Mr. Barry Broskowitz_

COMPANY/LOCATION: _Phoenix_

PHONE: _407-667-1100_ FAX: _407-667-1101_

*Message*

TOTAL PAGES INCLUDING COVER PAGE: _3_

FROM: _Kent Weisner_

## PHONE: (407) 299-3900
## FAX: (407) 299-8200
## E-mail: atek@gdi.net

We contacted more than fifty publishers of Computerized Maintenance Management Systems (CMMS), and received information from more than twenty of them. They have all taken the basic "here's a set of building blocks, now define your organization, equipment classification methodology, etc.". It is the "data centric" view, and not the "process" view that MasterLink adheres to.

All major desktop CMMS publishers such as DataStream, DPSI, JB Systems, CK Systems, PSDI, Mapcon, Omni Corp., HSB Reliability, and others, have taken the data approach. The cost to implement and manage their systems is very high, and they fail to deliver on promised improvements in productivity.
Consequently, the market for CMMS remains very fragmented and characterized by "niche" players specializing in very narrow sub-markets, e.g., a small group of local school boards.

Regarding, mid-range systems (AS400 types) such as J.D. Edwards', they are even more constraining than the desktop group (because of programming architecture) and have failed to address business process.

The CMMS market analysis is of limited value as we are not just a CMMS. We are a generic workflow management system that is process-focused, and enabled by intelligent agents. While we will ultimately replace them, we do not want to be categorized in a group
that has such a limited future.

Some of the products mentioned above implement the ability to generate planned maintenance activity based on task frequencies, or to automate the scheduling process by associating the appropriately skilled resource with the tasks to be performed. The way in which these processes occur is dependent on the perceptions of the designers and programmers who built the product to perform these functions, and usually allow little if any flexibility. MasterLink, through the use of agents and the Policies which govern their behavior put the user in control of how these processes are implemented. Through the graphic user interfaces that allow for flexible
modification of the rules and definitions that agents use to implement their roles, the determination of the way that work flow management processes occur is placed in management's' hands.

Another differentiator is the ability of MasterLink to define goals and objectives which become the basis for measuring the effectiveness of individual agent decisions, and the effectiveness of Policies overall. Thus providing a way for measuring whether the use of the system results in more productivity or cost savings with one Policy versus another.

A third distinguishing characteristic would be the use of state of the art architectures and software development methodologies. One of the basic tenets of object oriented development is that there is an acknowledgement that software, just as the real world, is in a continuous state of change.

We will be able to react to changes in the market place that have an impact on software quicker and with higher quality than older systems. Many of these existing systems have been around for quite a number of years and have only recently been converted to graphical user interfaces. The inherent weaknesses in those systems are therefore much more difficult to address, and this is one of the reasons that at each potential client we visited there was some level of dissatisfaction with their current systems.

# MasterLink

*Work Automation & Simplification*

MasterLink Corporation
3649 All American Blvd., Orlando, FL 32810-4726
407/299-3900 • Fax 407/299-8200 • E-mail: atek@gdi.net

Dear Richard & Barry,

Here is the next iteration on producing a development project plan and budget for MasterLink. I have enclosed a Gantt Chart identifying the major development iterations and the tasks within each iteration leading to the completion of both the MasterLink work management core, and the Facilities Maintenance application. This, as all project plans do, will evolve to reflect lower levels of detailed tasks within the ones now reflected. I have also included a resource sheet identifying the resources assigned to tasks within the plan, and a one page summary of development budget projections. The duration of tasks does not currently reflect any resource vacations or sick days, although major holidays are recognized as part of the standard Microsoft Project Calendar.

This represents only a product development plan, and does not reflect tasks associated with general business operations or marketing efforts. The budget information also represents only the estimates to support execution of the development plan, and does not include general business operating expenses or marketing expenses. The identification of that which is outside the scope of the development plan will be provided by Kent and Garry.

I hope this is an improvement over the first plan that we provided, and I look forward to your feedback.

Yours Truly,

John D. Hartman

# MasterLink
*Work Automation & Simplification*

MasterLink Corporation
3849 All American Blvd., Orlando, FL 32810-4726
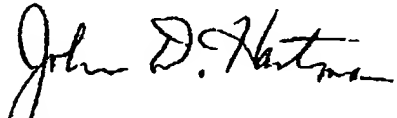407/299-3900 • Fax 407/299-8200 • E-mail: atek@gdi.net

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Yours Truly,

John D. Hartman

| ID | Task Name | Duration | Start | Finish | Pred |
|---|---|---|---|---|---|
| 1 | Company/Project Initiation | 26d | 3/2/98 | 4/6/98 | |
| 2 | Schedule Initial Meetings | 1d | 3/2/98 | 3/2/98 | |
| 3 | Identify / Implement Operating Procedures | 25d | 3/3/98 | 4/6/98 | 2 |
| 4 | Identify / Hire lead developer | 20d | 3/3/98 | 3/30/98 | 2 |
| 5 | Conceptual Design Phase | 60d | 3/9/98 | 5/29/98 | |
| 6 | Define System Architecture | 10d | 3/9/98 | 3/20/98 | 2FS+4d |
| 7 | Identify/Procure Development Environment | 15d | 3/23/98 | 4/10/98 | 6 |
| 8 | Recruit Development Staff | 20d | 3/23/98 | 4/17/98 | 6 |
| 9 | Install Development Environment | 5d | 4/13/98 | 4/17/98 | 7 |
| 10 | Use Case Analysis & Review | 20d | 4/13/98 | 5/8/98 | 7 |
| 11 | Begin GUI Prototyping | 20d | 4/20/98 | 5/15/98 | 8,10SS |
| 12 | Class Analysis/Design | 25d | 4/27/98 | 5/29/98 | 10SS+1 |
| 13 | Developer Training | 10d | 4/20/98 | 5/1/98 | 8,7 |
| 14 | Architecture Proof of Concept | 15d | 5/4/98 | 5/22/98 | 8,13 |
| 15 | Iteration 1 | 177d | 5/11/98 | 1/12/99 | |
| 16 | Identify Use Case Functions | 5d | 5/11/98 | 5/15/98 | 10 |
| 17 | Indentify / Review Classes | 20d | 5/18/98 | 6/12/98 | 16 |
| 18 | Design and Review Sequence Diagrams | 20d | 6/15/98 | 7/10/98 | 17 |
| 19 | Identify component and distribution models | 2d | 7/13/98 | 7/14/98 | 18 |
| 20 | Consulting | 2d | 7/15/98 | 7/16/98 | 19 |
| 21 | Facilities Domain Modelling | 45d | 6/1/98 | 7/31/98 | 12 |
| 22 | Define Policy Instances | 1d | 8/1/98 | 8/1/98 | 16 |
| 23 | Define Job/WorkSchedule State Transit | 5d | 6/2/98 | 6/8/98 | 22 |

Legend:
- Task
- Progress
- Milestone
- Summary
- Rolled Up Task
- Rolled Up Milestone
- Rolled Up Progress

| ID | Task Name | Duration | Start | Finish | Pred |
|---|---|---|---|---|---|
| 24 | Define Targets | 5d | 6/9/98 | 6/15/98 | 23 |
| 25 | Define Tasks & Skill Requirements | 10d | 6/16/98 | 6/29/98 | 24 |
| 26 | Define Resource Types | 1d | 6/30/98 | 6/30/98 | 25 |
| 27 | Define Rules for Agents | 20d | 7/1/98 | 7/28/98 | 26 |
| 28 | Consulting | 3d | 7/29/98 | 7/31/98 | 27 |
| 29 | Construction | 100d | 7/15/98 | 12/1/98 | |
| 30 | Construct Interfaces | 60d | 7/15/98 | 10/6/98 | 19 |
| 31 | Construct Agents | 75d | 7/15/98 | 10/27/98 | 19 |
| 32 | Implement Rules | 20d | 10/28/98 | 11/24/98 | 31,27 |
| 33 | Construct Domain Classes | 80d | 7/15/98 | 11/3/98 | 19 |
| 34 | Construct Messaging | 60d | 7/15/98 | 10/6/98 | 19 |
| 35 | Construct Persistence | 60d | 7/15/98 | 10/6/98 | 19 |
| 36 | Construct Testing Modules | 5d | 11/25/98 | 12/1/98 | 32 |
| 37 | Integration/Systems Test | 30d | 12/2/98 | 1/12/99 | 29 |
| 38 | Iteration 2 | 124d | 1/13/99 | 7/5/99 | |
| 39 | Identify Issues From Integration Tests | 2d | 1/13/99 | 1/14/99 | 37 |
| 40 | Identify Use Case Functions | 5d | 1/15/99 | 1/21/99 | 39 |
| 41 | Identify / Review Classes | 20d | 1/22/99 | 2/18/99 | 40 |
| 42 | Design and Review Sequence Diagrams | 20d | 2/19/99 | 3/18/99 | 41 |
| 43 | Identify component and distribution models | 2d | 3/19/99 | 3/22/99 | 42 |
| 44 | Facilities Domain Modeling | 31d | 1/22/99 | 3/5/99 | |
| 45 | Define Policy Instances | 1d | 1/22/99 | 1/22/99 | 40 |
| 46 | Define Job/Work/Schedule State Transit | 1d | 1/25/99 | 1/25/99 | 45 |

Timeline header: March (3/1, 3/8, 3/15, 3/22, 3/29), April (4/5, 4/12, 4/19, 4/28, 5/3, 5/10)

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Task
Progress
Milestone ◆

Summary
Rolled Up Task
Rolled Up Milestone ◇

Rolled Up Progress

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| ID | Task Name | Duration | Start | Finish | Pred |
|----|-----------|----------|-------|--------|------|
| 47 | Define Targets | 5d | 1/26/99 | 2/1/99 | 46 |
| 48 | Define Tasks & Skill Requirements | 5d | 2/2/99 | 2/8/99 | 47 |
| 49 | Define Resource Types | 1d | 2/8/99 | 2/9/99 | 48 |
| 50 | Define Rules for Agents | 15d | 2/10/99 | 3/2/99 | 49 |
| 51 | Consulting | 3d | 3/3/99 | 3/5/99 | 50 |
| 52 | Construction | 55d | 3/23/99 | 6/7/99 | |
| 53 | Construct Interfaces | 50d | 3/23/99 | 5/31/99 | 43 |
| 54 | Construct Agents | 30d | 3/23/99 | 5/3/99 | 43 |
| 55 | Implement Rules | 20d | 5/4/99 | 5/31/99 | 54,50 |
| 56 | Construct Domain Classes | 50d | 3/23/99 | 5/31/99 | 43 |
| 57 | Construct Messaging | 10d | 3/23/99 | 4/5/99 | 43 |
| 58 | Construct Persistence | 20d | 3/23/99 | 4/19/99 | 43 |
| 59 | Construct Testing Modules | 5d | 6/1/99 | 6/7/99 | 55 |
| 60 | Integration/Systems Test | 20d | 6/8/99 | 7/5/99 | 52 |
| 61 | Alpha Iteration | 104d | 7/6/99 | 11/26/99 | |
| 62 | Identify Issues From Integration Tests | 2d | 7/6/99 | 7/7/99 | 60 |
| 63 | Identify Use Case Functions | 5d | 7/8/99 | 7/14/99 | 62 |
| 64 | Indentify / Review Classes | 15d | 7/15/99 | 8/4/99 | 63 |
| 65 | Design and Review Sequence Diagrams | 15d | 8/5/99 | 8/25/99 | 64 |
| 66 | Identify component and distribution models | 2d | 8/26/99 | 8/27/99 | 65 |
| 67 | Facilities Domain Modeling | 28d | 7/15/99 | 8/19/99 | |
| 68 | Define Policy Instances | 1d | 7/15/99 | 7/15/99 | 63 |
| 69 | Define Job/Work/Schedule State Transit | 1d | 7/16/99 | 7/16/99 | 68 |

Timeline header: March — 3/1, 3/8, 3/15, 3/22, 3/29; April — 4/5, 4/12, 4/19, 4/26; 5/3, 5/10

Legend:
Task | Summary
Progress | Rolled Up Task
Milestone | Rolled Up Milestone
 | Rolled Up Progress

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| ID | Task Name | Duration | Start | Finish | Pred |
|----|-----------|----------|-------|--------|------|
| 70 | Define Targets | 5d | 7/19/99 | 7/23/99 | 69 |
| 71 | Define Tasks & Skill Requirements | 5d | 7/26/99 | 7/30/99 | 70 |
| 72 | Define Resource Types | 1d | 8/2/99 | 8/2/99 | 71 |
| 73 | Define Rules for Agents | 10d | 8/3/99 | 8/16/99 | 72 |
| 74 | Consulting | 3d | 8/17/99 | 8/19/99 | 73 |
| 75 | Construction | 35d | 8/30/99 | 10/15/99 | |
| 76 | Construct Interfaces | 20d | 8/30/99 | 9/24/99 | 66 |
| 77 | Construct Agents | 15d | 8/30/99 | 9/17/99 | 66 |
| 78 | Implement Rules | 15d | 9/20/99 | 10/8/99 | 77,73 |
| 79 | Construct Domain Classes | 20d | 8/30/99 | 9/24/99 | 66 |
| 80 | Construct Messaging | 10d | 8/30/99 | 9/10/99 | 66 |
| 81 | Construct Persistence | 20d | 8/30/99 | 9/24/99 | 66 |
| 82 | Construct Testing Modules | 5d | 10/11/99 | 10/15/99 | 78 |
| 83 | Integration/Systems Test | 30d | 10/18/99 | 11/26/99 | 75 |
| 84 | Beta Iteration | 69d | 11/29/99 | 3/1/00 | |
| 85 | Identify Issues From Integration Tests | 2d | 11/29/99 | 11/30/99 | 83 |
| 86 | Identify / Review Classes | 5d | 12/1/99 | 12/7/99 | 85 |
| 87 | Design and Review Sequence Diagrams | 5d | 12/8/99 | 12/14/99 | 86 |
| 88 | Identify component and distribution models | 1d | 12/15/99 | 12/15/99 | 87 |
| 89 | Facilities Domain Modeling | 10d | 12/1/99 | 12/14/99 | |
| 90 | Define Rules for Agents | 10d | 12/1/99 | 12/14/99 | 85 |
| 91 | Construction | 35d | 12/16/99 | 2/2/00 | |
| 92 | Construct Interfaces | 15d | 12/16/99 | 1/5/00 | 88 |

Timeline header: March (3/1, 3/8, 3/15, 3/22, 3/29), April (4/5, 4/12, 4/19, 4/26), May (5/3, 5/10)

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Task

Progress

Milestone ◆

Summary

Rolled Up Task

Rolled Up Milestone ◇

Rolled Up Progress

Page 4

| ID | Task Name | Duration | Start | Finish | Pred | March | | | | | April | | | | | M |
|----|-----------|----------|-------|--------|------|-------|---|---|---|---|-------|---|---|---|---|---|
| | | | | | | 3/1 | 3/8 | 3/15 | 3/22 | 3/29 | 4/5 | 4/12 | 4/19 | 4/26 | 5/3 | 5/10 |
| 93 | Construct Agents | 15d | 12/16/99 | 1/5/00 | 88 | | | | | | | | | | | |
| 94 | Implement Rules | 15d | 1/6/00 | 1/26/00 | 93,90 | | | | | | | | | | | |
| 95 | Construct Domain Classes | 15d | 12/16/99 | 1/5/00 | 88 | | | | | | | | | | | |
| 96 | Construct Messaging | 5d | 12/18/99 | 12/22/99 | 88 | | | | | | | | | | | |
| 97 | Construct Persistence | 15d | 12/16/99 | 1/5/00 | 88 | | | | | | | | | | | |
| 98 | Construct Testing Modules | 5d | 1/27/00 | 2/2/00 | 94 | | | | | | | | | | | |
| 99 | Integration/Systems Test | 20d | 2/3/00 | 3/1/00 | 91 | | | | | | | | | | | |

| | | | | |
|---|---|---|---|---|
| Task | | Summary | | Rolled Up Progress |
| Progress | | Rolled Up Task | | |
| Milestone | | Rolled Up Milestone | | |

**2  Schedule Initial Meetings**

At project and company start up there will be significant initial coordination of meetings to identify all actions and tasks necessary to establish the company as an operating entity. The results of this task would subsequently be reflected in this plan, and meetings and actions will become predecessors to certain tasks within the plan being started.

**3  Identify / Implement Operating Procedures**

The logistics and standard operating procedures between the relevant parties must be agreed upon at start up. This will include formalization of such items as schedules for status reporting, vehicles/tools for tracking progress and resolving issues, invoicing and payment terms, administrative responsibilities, set up of bank accounts, etc. This must be in place prior to additional resources being hired and before true operation of the company can begin.

**4  Identify / Hire lead developer**

This is the lead technical resource to assume responsibility for day to day management of MasterLink developers and the key person to work with John Hartman. This resource must be involved in the "Conceptual Design" phase as soon as possible. This individual may be one for which some portion of an equity reserve would be allocated.

**5  Conceptual Design Phase**

Although labeled a "Conceptual Design", our impressions are that this is actually a little more. We would have to get down to the physical level in respect to the "System Interfaces" task below, and to be capable of building the initial "Prototype" functioning version. Those designs which don't relate directly to interfaces between system components can be considered a black box by the development entities not responsible for building them, and would not require such rigor during this phase. As a result, this design phase is of significant duration and key to the success of the project as a whole.

**6  Define System Architecture**

The client and server hardware and operating system environment must be specifically identified, and include designation of Operating System versions to be utilized for initial development. This will also identify all major application software components and identify what language and development tools will be used for each. This will include specification of network transport layers and protocols, persistence mechanisms (DBMS), and existing libraries such as ILOG to be used. This must be reviewed and agreed to by all principles prior to any procurements for a development environment. The lead developer will be involved assuming he has been hired. If not we will not wait to complete this task.

**7  Identify/Procure Development Environment**

This represents the task of selecting products and vendors, negotiating support agreements, etc. based on the approved system architecture. There will be some lead time on receipt of all of the components. Physical space and logistics will need to be finalized. Some items may be payment deferrable, such as software libraries, but we should anticipate some significant cash flow to complete this task. The lead developer will be involved assuming he has been hired. If not we will not wait to complete this task.

**8  Recruit Development Staff**

Once we have approved the system architecture and identified the development environment, we can define the specific skill requirements and begin the recruitment for the remaining development staff. We will attempt to minimize the need for agency fee expenditures, but this may represent a risk factor. Hiring qualified technical personnel is very difficult in the current market, and getting good ones quickly is one of the keys to early project milestones being achieved. I will need the Lead Developer's assistance with this task so he must be on board by this time, and this plan identifies a staff of 5 in addition to the Lead Developer.

**9  Install Development Environment**

The development environment must be installed and configured prior to any significant construction effort by developers. If any of the development staff positions are filled by this time, they will assist with this task.

**10  Use Case Analysis & Review**

This task will define the required end user and system interfaces to the MasterLink system. There are many use cases that already exist as part of the current collection of design artifacts, and this means that this task is largely a review and enhancement to those use cases. The body of use cases as a whole will represent the documented statement of MasterLink system requirements, and as such must be reviewed and approved before designs to provide solutions to those requirements can be completed.

**11  Begin GUI Prototyping**

Based on hiring of the primary GUI developer, and the finalization of some of the use cases from the predecessor task, we can begin to develop interface prototypes for review.

**12  Class Analysis/Design**

The MasterLink logical design will require additions / adjustments to react to new use cases that were not conceived of prior to the "Use Case Analysis" task above, and based on the approved system architecture to begin the addition of physical classes to the new logical models. This will involve such specific activities as finalizing the interfaces of the agents, updating existing class specifications w the physical definition of attributes, e.g. a Task Name defined as a Rogue Wave String with a constrained length, defining the component model which allocates classes to the binaries that they are destined to become part of, and creating the distribution model if processes are to be distributed across address spaces. In an object oriented project this is not normally done all at once, but in an iterative fashion as scope and functionality is expanded. This is more likely to be an on going task, but for purposes of submitting a plan at this early date we include this estimate for the initial effort. It is assumed that we have hired the primary server based and agent developer to be involved on this task, and these models should be reviewed and approved by relevant principles before any construction tasks are performed other than prototyping.

**13  Developer Training**

This is expected to be primarily training related to the use of ILOG libraries for developing intelligent agents. There may be other training required associated with other architectural components, but this is not explicitly reflected in the plan at this time.

**15**

This is the first construction task and does not attempt to implement any application functionality. It is a skeleton of a system that integrates all of the architectural components, both hardware and software, to validate that they function together compatibly, and that the architecture will support the layering of the application on top of it. This will be maintained going forward so that as versions of architectural components change over time, they can be applied to this Proof of Concept deliverable before being applied to the system in development. This helps to avoid unexpected integration problems which can negatively impact development schedules.

**Iteration 1**

The first deliverable of application functionality which should include some set of functions to exercise all major architectural components. This is not prototype code to be discarded, but rather an initial construction of a subset of all classes, with a subset of the interfaces of those classes to be implemented. Subsequent iterations build on additional functionality on Iteration 1 classes and add additional classes until all functions and requirements have been delivered.

**16 Identify Use Case Functions**

This task determines the functional content of the deliverables for the development iteration and will be repeated for each iteration.

**17 Indentify / Review Classes**

This is scoped by the previous task and is part of the on going Class Analysis/Design process associated with object oriented iterative development.

**18 Design and Review Sequence Diagrams**

This task provides the details of inter class messaging to implement use case related functionalities. This is also part of the on going object oriented iterative development process, and is one of the primary inputs to the design review and approval process.

**19 Identify component and distribution models**

This task maps classes and interfaces to physical system binary components to be built across the clients and the server platforms.

**20 Consulting**

Certainly for Iteration 1, and possibly for subsequent iterations, we will want to have some review and consultation with key vendor partners such as ILOG and ODI. The duration of these tasks would be shorter in the later iterations, if we deem them necessary at all.

**21 Facilities Domain Modeling**

This category of tasks is that which will be performed for each MasterLink Vertical Domain Application that we implement. We have a head start on this for Facilities Maintenance because that is what we have created a logical design for at this point. We will focus on the ones that we target for Iteration 1, then continually add to the scope of this in subsequent iterations. This is going to be an on going task that is part of each iteration of development. This duration is assumed to only be specific to the first iteration, and is likely to be shorter in subsequent iterations.

**22 Define Policy Instances**

The start of defining a work management environment to the system begins with identification of the Policies to be created. There can be one that governs work management of all resources and targets of work, or there can be many.

**23 Define Job/WorkSchedule State Transitions**

At a high level, the MasterLink components will make decisions which automate state transitions associated with Jobs and WorkSchedules. This task will define all the possible states and relationships between states which the MasterLink agents will be expected to manage.

**24 Define Targets**

This involves defining a target classification hierarchy, and the physical targets of work that will fall into the hierarchy. For Facilities Maintenance the classification system already exists in the form of the Construction Specification Institute standards. This task therefore will consist mostly of physical target identification needed to support the use cases to be implemented in this iteration of development. For clients we will have to create interfaces for entering physical target information.

**25 Define Tasks & Skill Requirements**

These are the tasks to be performed by skilled resources and applied to some defined targets. These will be placed in jobs that will go on workschedules that get dispatched to workers.

**26 Define Resource Types**

This is related to the task definitions and the skills required to complete them.

**27 Define Rules for Agents**

The MasterLink agents will make decisions regarding actions to be taken which will affect the state of Jobs and WorkSchedules. These decisions are to be based on a user defined set of rules and constraints. This task will identify those rules and constraints to be implemented by the agents. This task may actually be more of an on going task, since the results of applying these will determine the behavior of the agents and impact the effectiveness of any given instance of Maintenance Policy.

**28 Consulting**

Certainly for Iteration 1, and possibly for subsequent iterations, we will want to have some review and consultation with key vendor partners such as ILOG and ODI. The duration of these tasks would be shorter in the later iterations, if we deem them necessary at all.

**29 Construct Interfaces**

This represents the construction and unit testing of all the required user interfaces to the MasterLink system for the current iteration.

**30 Construct Agents**

This is the construction of the MasterLink intelligent agents utilizing the commercial libraries as a basis. This is expected to be the most complex, and therefore the longest, development effort of the

MasterLink components.

**32 Implement Rules**
Once the agents are constructed then the rules to be used when the agents perform a state transition have to be created in the rules language syntax. Once we have an interface to allow rule creation by a user this task will not be needed.

**33 Construct Domain Classes**
This is a large volume of work to create the Facilities Maintenance Domain classes needed to support system functionality as stated in use cases. This is not difficult programming, but there is a lot of it to do.

**34 Construct Messaging**
Once the proof of concept integration of the message middleware has been completed, this is the development of all the distributed messages involving the MasterLink layer as either the sender or receiver. This will implement the externally published APIs for any MasterLink classes.

**35 Construct Persistence**
This task is to physically design and implement the data stores associated with the MasterLink persistent classes.

**36 Construct Testing Modules**
This task is to develop simulation code which will exercise the MasterLink API in representation of other system components.

**37 Integration/Systems Test**
This is an integrated test based on a test plan that will excercise all functionality and components of the system associated with the current iteration. Results are used to help define the next iteration's contents.

**38 Iteration 2**
The second deliverable of application functionality which should include most if not all functions to be included in the first marketable version.

**39 Identify Issues From Integration Tests**
A review of the test results of the prior iteration will identify items to be resolved or changes to designs which will be designated as part of the current iteration.

**40 Identify Use Case Functions**
This task determines the functional content of the deliverables for the development iteration and will be repeated for each iteration.

**41 Identify / Review Classes**
This is scoped by the previous task and is part of the the on going Class Analysis/Design process associated with object oriented iterative development.

**42 Design and Review Sequence Diagrams**
This task provides the details of inter class messaging to implement use case related functionalities. This is also part of the on going object oriented iterative development process, and is one of the primary inputs to the design review and approval process.

**43 Identify component and distribution models**
This task maps classes and interfaces to physical system binary components to be built across the clients and the server platforms.

**44 Facilities Domain Modeling**
This category of tasks is that which will be performed for each MasterLink Vertical Domain Application that we implement. We have a head start on this for Facilities Maintenance because that is what we have created a logical design for at this point. We will attempt to include all modeling that is intended for the first marketable version in iteration 2. This is going to be an on going task that is part of each iteration of development.

**45 Define Policy Instances**
The start of defining a work management environment to the system begins with identification of the Policies to be created. There can be one that governs work management of all resources and targets of work, or there can be many.

**46 Define Job/WorkSchedule State Transitions**
At a high level, the MasterLink components will make decisions which automate state transitions associated with Jobs and WorkSchedules. This task will define all the possible states and relationships between states which the MasterLink agents will be expected to manage.

**47 Define Targets**
This involves defining a target classification hierarchy, and the physical targets of work that will fall into the heirarchy. For Facilities Maintenance the classification system already exists in the form of the Construction Specification Institute standards. This task therefore will consist mostly of physical target identification needed to support the use cases to be implemented in this iteration of development. For clients we will have to create interfaces for entering physical target information.

**48 Define Tasks & Skill Requirements**
These are the tasks to be performed by skilled resources and applied to some defined targets. These will be placed in jobs that will go on workschedules that get dispatched to workers.

**49 Define Resource Types**
This is related to the task definations and the skills required to complete them.

The MasterLink agents will make decisions regarding actions to be taken which will affect the state of Jobs and WorkSchedules. These decisions are to be based on a user defined set of rules and constraints. This task will identify those rules and constraints to be implemented by the agents. This task may actually be more of an on going task, since the results of applying these will determine the behavior of the agents and impact the effectiveness of any given instance of Maintenance Policy.

**51 Consulting**
Certainly for iteration 1, and possibly for subsequent iterations, we will want to have some review and consultation with key vendor partners such as ILOG and ODI. The duration of these tasks would be shorter in the later iterations, if we deem them necessary at all.

**53 Construct Interfaces**
This represents the construction and unit testing of all the required user interfaces to the MasterLink system for the current iteration.

**54 Construct Agents**
This is the construction of the MasterLink intelligent agents utilizing the commercial libraries as a basis. This is expected to be the most complex, and therefore the longest, development effort of the MasterLink components.

**55 Implement Rules**
Once the agents are constructed then the rules to be used when the agents perform a state transition have to be created in the rules language syntax. Once we have an interface to allow rule creation by a user this task will not be needed.

**56 Construct Domain Classes**
This is a large volume of work to create the Facilities Maintenance Domain classes needed to support system functionality as stated in use cases. This is not difficult programming, but there is a lot of it to do.

**57 Construct Messaging**
Once the proof of concept integration of the message middleware has been completed, this is the development of all the distributed messages involving the MasterLink layer as either the sender or receiver. This will implement the externally published API's for any MasterLink classes.

**58 Construct Persistence**
This task is to physically design and implement the data stores associated with the MasterLink persistent classes.

**59 Construct Testing Modules**
This task is to develop simulation code which will exercise the MasterLink API in representation of other system components.

**60 Integration/Systems Test**
This continues the previous test effort by attempting to set up integrated test environments with other system components. This will require some detailed planning before the project reaches this point.

**61 Alpha Iteration**
This is a refinement and revision of iteration 2, and should result in the first implementation that could be tested by potential clients. There should be little new functionality and this phase is where we would include any performance tuning and operational reliability tasks.

**62 Identify Issues From Integration Tests**
A review of the test results of the prior iteration will identify items to be resolved or changes to designs which will be designated as part of the current iteration.

**63 Identify Use Case Functions**
This task determines the functional content of the deliverables for the development iteration and will be repeated for each iteration.

**64 Indentify / Review Classes**
This is scoped by the previous task and is part of the on going Class Analysis/Design process associated with object oriented iterative development.

**65 Design and Review Sequence Diagrams**
This task provides the details of inter class messaging to implement use case related functionalities. This is also part of the on going object oriented iterative development process, and is one of the primary inputs to the design review and approval process.

**66 Identify component and distribution models**
This task maps classes and interfaces to physical system binary components to be built across the clients and the server platforms.

**67 Facilities Domain Modeling**
This category of tasks is that which will be performed for each MasterLink Vertical Domain Application that we implement. We have a head start on this for Facilities Maintenance because that is what we have created a logical design for at this point. We will focus on the ones that we target for iteration 1, then continually add to the scope of this in subsequent iterations. This is going to be on going task that is part of each iteration of development. This duration is assumed to only be specific to the first iteration, and is likely to be shorter in subsequent iterations.

**68 Define Policy Instances**
The start of defining a work management environment to the system begins with identification of the Policies to be created. There can be one that governs work management of all resources and targets of work, or there can be many.

**69 Define Job/WorkSchedule State Transitions**
At a high level, the MasterLink components will make decisions which automate state transitions associated with Jobs and WorkSchedules. This task will define all the possible states and relationships

between states which the MasterLink agents will be expected to manage.

**70  Define Targets**
This involves defining a target classification hierarchy, and the physical targets of work that will fall into the hierarchy. For Facilities Maintenance the classification system already exists in the form of the Construction Specification Institute standards. This task therefore will consist mostly of physical target identification needed to support the use cases to be implemented in this iteration of development. For clients we will have to create interfaces for entering physical target information.

**71  Define Tasks & Skill Requirements**
These are the tasks to be performed by skilled resources and applied to some defined targets. These will be placed in jobs that will go on workschedules that get dispatched to workers.

**72  Define Resource Types**
This is related to the task definitions and the skills required to complete them.

**73  Define Rules for Agents**
The MasterLink agents will make decisions regarding actions to be taken which will affect the state of Jobs and Workschedules. These decisions are to be based on a user defined set of rules and constraints. This task will identify those rules and constraints to be implemented by the agents. This task may actually be more of an on going task, since the results of applying these will determine the behavior of the agents and impact the effectiveness of any given instance of Maintenance Policy.

**74  Consulting**
Certainly for iteration 1, and possibly for subsequent iterations, we will want to have some review and consultation with key vendor partners such as ILOG and ODI. The duration of these tasks would be shorter in the later iterations, if we deem them necessary at all.

**76  Construct Interfaces**
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**81  Construct Persistence**
This task is to physically design and implement the data stores associated with the MasterLink persistent classes.

**82  Construct Testing Modules**
This task is to develop simulation code which will exercise the MasterLink API in representation of other system components.

**83  Integration/Systems Test**
This continues the previous test effort by attempting to set up integrated test environments with other system components. This will require some detailed planning before the project reaches this point.

**84  Beta Iteration**
This is really the first version intended for commercial sale and use by clients. It is labeled Beta only until we can get confirmation from an external client that it does what it is supposed to, and functions as advertised.

**85  Identify Issues From Integration Tests**
A review of the test results of the prior iteration will identify items to be resolved or changes to designs which will be designated as part of the current iteration.

**86  Identify / Review Classes**
This is scoped by the previous task and is part of the on going Class Analysis/Design process associated with object oriented iterative development.

**87  Design and Review Sequence Diagrams**
This task provides the details of inter class messaging to implement use case related functionalities. This is also part of the on going object oriented iterative development process, and is one of the primary inputs to the design review and approval process,

**88  Identify component and distribution models**
This task maps classes and interfaces to physical system binary components to be built across the clients and the server platforms.

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**98    Construct Testing Modules**

This task is to develop simulation code which will exercise the MasterLink API in representation of other system components.

**99    Integration/Systems Test**

This continues the previous test effort by attempting to set up integrated test environments with other system components. This will require some detailed planning before the project reaches this point.

| ID | Resource Name | Initials | Group | Max. Units | Std. Rate | Ovt. Rate | Cost/Use | Accrue At |
|----|---------------|----------|-------|------------|-----------|-----------|----------|-----------|
| 1 | Garry Fenimore | GF | | 1 | $0.00/h | $0.00/h | $0.00 | Prorated |
| 2 | John Hartman | JH | | 1 | $0.00/h | $0.00/h | $0.00 | Prorated |
| 3 | Kent Weisner | KW | | 1 | $0.00/h | $0.00/h | $0.00 | Prorated |
| 4 | Barry Broskowitz | BB | | 1 | $0.00/h | $0.00/h | $0.00 | Prorated |
| 5 | Lead Developer | LD | | 1 | $0.00/h | $0.00/h | $0.00 | Prorated |
| 6 | GUI Developer | GD | | 1 | $0.00/h | $0.00/h | $0.00 | Prorated |
| 7 | Agent Developer | AD | | 1 | $0.00/h | $0.00/h | $0.00 | Prorated |
| 8 | Developer 4 | D4 | | 1 | $0.00/h | $0.00/h | $0.00 | Prorated |
| 9 | Developer 5 | D5 | | 1 | $0.00/h | $0.00/h | $0.00 | Prorated |
| 10 | Developer 6 | D6 | | 1 | $0.00/h | $0.00/h | $0.00 | Prorated |

MasterLink

| Salaries | | OTO | Year 1 | Year 2 | Total |
|---|---|---|---|---|---|
| | JH | | 100,000 | 100,000 | |
| | KW | | 75 | 75 | |
| | GF | | 75 | 75 | |
| | LD | | 75 | 75 | |
| | AD | | 75 | 75 | |
| | GD | | 60 | 60 | |
| | D4 | | 60 | 60 | |
| | D5 | | 50 | 50 | |
| | D6 | | 50 | 50 | |
| | D7 | | 50 | 50 | |
| | | | 670,000 | 670,000 | 1,340,000 |
| Benefits @ 25% | | | 167,500 | 167,500 | 335,000 |
| Hardware | | 25,000 | | | 25,000 |
| Software | | 75,000 | | | 75,000 |
| Training/Consulting | | 30,000 | | | 30,000 |
| | | | | | |
| Total | | | | | 1,805,000 |

Subject:
>    MasterLink Meeting 2-3-98,One Page MasterLink Overview & Crosby Meeting..
. Date:
>    Wed, 04 Feb 1998 12:50:39 -0500
From:
>    "Kent A. Weisner" <atek@gdi.net>
Organization:
>    A-Tek Consultants, Inc.
To:
>    Richard Licursi <licursi@pwgi.com>
CC:
>    Barry Broskowitz <broskowitz@worldnet.att.net>

Richard,

We are delighted that you want to do the MasterLink Development Project.
I apologize for the departure but the time with Crosby was well spent.

Need to discuss with you some recent developments regarding contact with
Ken Woods. At Barry's suggestion I have been pursuing him for possible
MasterLink contribution. This has lead to some interesting thoughts for
the use of A-Tek as a support vehicle for short and long term assistance
for MasterLink. We need to talk.

Meant to give you the one page overview yesterday.

In brief, Crosby found great interest in the ability of MasterLink to
measure the contribution of Quality Management within an enterprise.
Each fall, the Crosby company has an annual meeting of their
international sales organization. We have been invited to present the
MasterLink prototype to them at that time. They recognized the ability
of MasterLink to compress the communication link between upper
management and the worker. We substituted compression for flattening
which was a source of amusement during the meeting, i.e. (it is ok if
you are flator, not so good if you are the flatee, paraphrases Philip
Crosby) Another area of discussion included the possibility that they
could promote MasterLink as part of the Crosby organization pitch. This
is a interesting sales augmentation opportunity.

Kent


presentation info 7slides.RTF

            Name:
                presentation info 7slides.RTF
            Type:
                Microsoft Word Document (application/msword)
            Encoding:
                base64

# A-TEK CONSULTANTS, INC.

### 3649 All American Blvd.
### Orlando, Florida 32810-4726
### E-mail: atek@gdi.net

DATE: _OCTOBER 7, 1997_     TIME SENT: _____

PLEASE DELIVER THIS FAX TO: Mr. Gary Mann,Pres. Commercial Systems Group

COMPANY/LOCATION: _____ LOCKHEED Martin I.S.
12506 Lake Underhill Road, MP 856
Orlando, Florida 32825

PHONE: _____     FAX: 306-1204 _____

*Message* :Dear Mr. MANN:

THE ORLANDO COMPUTER CONFERENCE OF 10/6/97 ENDED ON A PREDICTABLE MIX OF THE
UPBEAT AND A CONTINUING PROMISE OF GOOD THINGS TO COME.

MASTERLINK © HAS THE ENVIABLE DISTINCTION OF WHERE IT IS GOING AND HOW BEST TO
GET THERE. WE HAVE HAD THE RECENT GOOD FORTUNE OF OBTAINING THE USE OF OO DEV-
ELOPMENT SOFTWARE THAT WILL SHORTEN CODING TIME AND EFFORT FOR ALL MANNER OF

BUSINESS DOMAIN APPLICATIONS.

WE ARE MOST EAGER TO MEET AND DISCUSS THE WORK Flow management PROCESS IMPROVEMENT POTENTIAL

INHERENT IN MASTERLINK ©. KENT WEISNER WILL BE OUT OF TOWN FOR THE BALANCE OF
THIS WEEK. WE WOULD APPRECIATE SCHEDULING A GET TO GETHER THE WEEK OF 10/13/97

AT YOUR CONVENIENCE.

MASTERLINK © ---"MAKING THE WORLD A BETTER PLACE IN WHICH TO WORK"

TOTAL PAGES INCLUDING COVER PAGE: _ONE_

FROM: _____ LEE G. KITCHEN _____

### PHONE: (407) 299-3900
### FAX:      (407) 299-8200
### E-mail: atek@gdi.net

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